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EMPLOYEE ATTITUDES

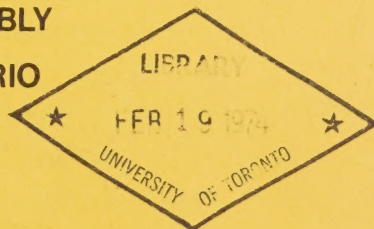
Prepared as part of a study on
**FOREIGN OWNERSHIP:
CORPORATE BEHAVIOUR AND PUBLIC ATTITUDES**

for the
SELECT COMMITTEE ON ECONOMIC AND CULTURAL NATIONALISM
of the

**LEGISLATIVE ASSEMBLY
PROVINCE OF ONTARIO**

by
KATES, PEAT, MARWICK & CO.

in Association with
CANADIAN FACTS CO. LTD.
FEBRUARY , 1974



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Russell D. Rowe, M.P.P. (Chairman)	Northumberland
Donald M. Deacon, M.P.P.	York Centre
Ian Deans, M.P.P.	Wentworth
Sidney B. Handleman, M.P.P.	Carleton
R. Glen Hodgson, M.P.P.	Victoria-Haliburton
R. Douglas Kennedy, M.P.P.	Peel South
Nicholas G. Leluk, M.P.P.	Humber
Elie W. Martel, M.P.P.	Sudbury East
William G. Newman, M.P.P.	Ontario South
Richard S. Smith, M.P.P.	Nipissing
Gordon W. Walker, M.P.P.	London North

STAFF

Ivan R. Feltham, Q.C.	Counsel
C. Kenningham Marchant	Research Director
John A. Holtby	Clerk of the Committee

.....

The views expressed in this report are those of the
Kates, Peat, Marwick & Company Study Team, and are not necessarily
those of the Select Committee.

.....

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January 21, 1974

Mr. Russell D. Rowe, MPP
Chairman
Select Committee on Economic and
Cultural Nationalism
Room 104
Parliament Buildings
Queen's Park
Toronto, Ontario

Dear Mr. Rowe:

This report, Employee Attitudes, is submitted to you as part of the overall study of Foreign Ownership: Corporate Behaviour and Public Attitudes which we are conducting on behalf of the Committee. It presents the second of two attitude surveys to be reported on by our firm, and undertaken in association with Canadian Facts Co. Ltd.

We would like to express our appreciation to the firms and their employees who took part in the survey, and to the staff of the Select Committee and Select Committee members who assisted in reviewing an earlier draft of the report.

In accordance with our terms of reference, this report describes the attitudes of employees in selected Canadian and Foreign-controlled firms in six industries, regarding various issues of foreign ownership and control. The firms and industries covered in this survey are the same as those included in the six industry sub-studies presented in six companion volumes to this report.

We have attempted to make the report as complete and objective as possible within the context of available time and resources, and we trust it will assist the Committee in its deliberations.

Yours truly

Kates, Peat, Marwick & Co.

KATES, PEAT, MARWICK & CO. STUDY TEAM

Responsible Partner:	Neal A. Irwin
Project Director:	Peter F. E. Lyman
Other Team Members:	David S. Barrows Harvey W. Kriss Evelyn H. Lazare (Ms.) Peter E. Sandor Robert W. J. Sturgess

CANADIAN FACTS CO. LTD. SURVEY TEAM

Technical Advisor:	John A. Gonder
Senior Study Supervisor:	Donald G. McGrath
Study Supervisor:	Michael D. Smith

FOREIGN OWNERSHIP AND EMPLOYEE ATTITUDES

TABLE OF CONTENTS

	<u>Page</u>
<u>I - SURVEY CHARACTERISTICS</u>	1
Purpose of Survey	1
Survey Procedures	2
Limitations of the Survey	9
 <u>II - DESCRIPTION OF THE SAMPLE</u>	 13
Biographical Data	13
Union Affiliation	17
Employment History and Foreign Experience	19
Conclusion	24
 <u>III - PERCEIVED AUTONOMY</u>	 25
Question Design	25
Perceived Autonomy	26
"Branch Office" Control Question	35
Conclusion	39
 <u>IV - JOB SATISFACTION.</u>	 41
Question Design	41
Foreign/Canadian Differences	42
Employee Job Satisfaction in General	50
Conclusions	51
 <u>V - ATTITUDES TOWARD CORPORATE BEHAVIOUR</u>	 55
Question Design	55
Manufacturing and Resource Industries	57
Service Sector	64
Conclusions	68

TABLE OF CONTENTS

- 2 -

<u>VI - "WRITE-IN" OPINIONS.</u>	71
Overview of "Write-In" Response	71
Main Themes Expressed	72
Industry Themes	76
Conclusions	77
 <u>VII - NATIONALIST SENTIMENT</u>	 79
Question Design	79
Direct Nationalist Sentiment	80
Indirect Indices of Nationalist Sentiment.	88
Conclusions.	94
 <u>VIII - CONCLUSIONS</u>	 95
Main Conclusions	95

EXHIBITS

1. Size of Sample Necessary to be Practically Sure (19 Times out of 20) of Accuracy Within Limits Shown. .	12
2. Biographical Profile of Respondents	14
3. Selected Industry Statistics	16
4. Membership in Unions	18
5. Specific Union Affiliations	20
6. Number of Years with Current Company	21
7. Comparison of Employees of Foreign-Controlled Versus Canadian-Controlled Companies	22

TABLE OF CONTENTS

- 3 -

8.	Structure and Response Profile of Section A	27
9.	Canadian Offices' Association With Offices Outside Canada	28
10.	Frequency of Approval Required by Canadian Subsidiaries of Foreign-Controlled Companies	31
11.	Mine/Plant Employees' Perceived Association With Supervising Office	34
12.	Comparison of Autonomy: Branch Office to Canadian Head Office vs. Canadian Subsidiary to Foreign Parent.	37
13.	Comparison of Approval: Branch Office to Canadian Head Office vs. Canadian Subsidiary to Foreign Parent.	38
14.	Foreign/Canadian Comparison on Job Satisfaction - All Employees	43
15.	Foreign/Canadian Comparison by Sector Of Total Score on Job Satisfaction.	45
16.	Dissatisfaction most likely to Cause Resignation - All Employees	47
17.	Preference for Working in a Canadian-Controlled Firm.	48
18.	Comparison by Industry of Total Job Satisfaction Score.	52
19.	Opinions Related to Own Industry All Employees in the Manufacturing and Resource Sectors	58
20.	Foreign/Canadian Comparison of Resource Industries - Attitudes Towards Resource Utilization	63
21.	Advertising Employees' Attitudes Toward Corporate Behaviour and Government Initiatives	65
22.	Engineering Consulting Employees' Attitudes Toward Corporate Behaviour and Government Initiatives	67
23.	Nationalist Sentiment	81
24.	Comparison of Foreign/Canadian Nationalist Feeling By Industry	83

TABLE OF CONTENTS

- 4 -

25.	Nationalist Sentiment	85
26.	Nationalist Sentiment Held by Different Age Groups . . .	86
27.	Comparison of Strong Nationalist Sentiment by Occupation	87
28.	Foreign/Canadian Comparison of Opinion Concerning U.S. Investment in Canada	89
29.	Awareness of Ownership of Major Companies	91
30.	Perceived Ownership of Respondent's Company - Total Respondents	93

APPENDICES

A.	Employee Survey Questionnaire and Covering Letter	101
B.	Method for Calculating Statistical Significance of Responses to Scale Questions	160

I - SURVEY CHARACTERISTICS

This report contains the results of a survey of employee attitudes conducted for the Ontario Select Committee on Economic and Cultural Nationalism. The employee attitude survey was one of several sub-studies undertaken by Kates, Peat, Marwick & Co. in association with Canadian Facts Co. Ltd. as part of a study of Foreign Ownership: Corporate Behaviour and Public Attitudes.

The survey consisted of a self-administered questionnaire sent to the homes of a random sample of employees in selected firms in six industries between March and July, 1973. In this section, we describe the purpose of the questionnaire and how it was developed and administered.

PURPOSE OF SURVEY

The survey was designed to dovetail with the sub-studies of six industries undertaken by Kates, Peat, Marwick & Co. for the Select Committee. The purpose of these sub-studies was to identify behavioural differences between Canadian- and foreign-controlled firms in each industry. The industry sub-studies examined each industry through interviews of senior businessmen and through industry research. It was felt that obtaining the perceptions of employees in each industry would also contribute to a general understanding of the behavioural differences between Canadian- and foreign-controlled companies. Therefore, a survey of employee attitudes was undertaken in each industry, focussing on the same firms which were involved in the industry sub-studies.

The general purpose of the survey was to determine the differences, if any, in attitudes between employees of foreign-controlled firms in comparison with attitudes of employees of Canadian-controlled firms. The survey was designed with the following as specific objectives:

1. To compare levels of job satisfaction among employees of the two sets of firms.
2. To determine whether the behaviour of foreign-controlled firms was perceived as different from that of Canadian-controlled firms by their employees.
3. To determine whether there were differences in employees' attitudes about nationalism and foreign ownership issues.

In this report conclusions are drawn about these subjects on the basis of the survey results. Where possible, industries are examined on an individual basis.

SURVEY PROCEDURES

Since the employee attitude survey complemented the industry sub-studies, the sample employees were drawn from the companies and industries that were examined in those sub-studies. The industries were selected to cover the service, manufacturing, and resource sectors, and are shown as follows with the mail-out of questionnaires.

Service Sector

Advertising

Architecture and
Engineering Consulting

Mail-out

234 questionnaires

271 "

<u>Manufacturing Sector</u>	<u>Mail-out</u>
Auto parts	399 questionnaires
Electronics	300 "
<u>Resource Sector</u>	
Pulp and paper	563 "
Mining (metals)	<u>478</u> "
Total:	2,245 questionnaires.

The survey consisted of a self-administered questionnaire sent to the homes of the employees by Canadian Facts with a covering letter from the Chairman of the Select Committee, Mr. Rowe. A copy of the questionnaire and covering letter is attached as Appendix A.

The standard procedure for administering the questionnaires was as follows:

- obtain approval from senior management in each of the companies approached
- in co-operation with company management select a random sample of employees from company records
- send questionnaire to the home of the respondent assuring respondent of confidentiality
- employee completes questionnaire and returns in an unmarked addressed envelope to Canadian Facts for tabulation.

The confidentiality of the respondents' identities was maintained; replies were tabulated only on an aggregate basis. In obtaining the co-operation of participating companies, they were assured that the survey results would be presented in aggregate form to disguise the identify of particular companies. This guarantee of confidentiality was similar to that given to company officials in their disclosure of information for the industry sub-studies.

Sample Selection

The survey was to consist of a random sample of the employees in the companies selected for analysis in the industry sub-studies. The number of firms that participated in the survey was distributed among the six industries as follows:

Industries	NUMBER OF FIRMS		
	Canadian-Controlled	Foreign-Controlled	Total
Advertising	7 (including five small agencies)	2	9
Architecture and Engineering Consulting	3 (including one architectural firm)	2	5
Auto Parts	2	3	5
Electronics	1	1	2
Mining	2	2	4
Pulp and Paper	2	3	5
Total:	17	13	30

A problem in selecting the sample was that some companies which participated in the industry sub-studies declined to participate in the employee attitude study. There are four clear-cut cases of companies not wanting to participate, two of which were Canadian-controlled companies, and the reasons given were primarily associated with labour problems. The major effect on the sample selected is an under-representation of firms (but not employees) in the electronics industry; substitute companies could not be arranged at the last minute in this industry.

It had been initially assumed that the questionnaire would be directed toward "upper echelon" employees, rather than to a sample of all the employees in the company. The original intention was to solicit opinions from employees who could possibly be said to have some educated knowledge of their company's operations in the industry, and the questionnaire was designed with this in mind. However, it was decided, following a meeting with the Select Committee, to extend the sample to all employees. Thus, in all cases, an attempt was made to ensure that a random sample of the employees of the company was selected.

An attempt was made to draw the sample from the Ontario-based employees, although there were a minimal number of instances of non-Ontario residents completing the questionnaires because they had at some time been employed in the province.

An additional problem occurred in that three companies participated in the employee survey only on the basis that certain parts of

their work force would be excluded from the mail-out. Usually, strikes or other labour problems were cited as the reasons for non-participation. The result is that there is an over-representation of employees in the "white collar" category among those who received the questionnaire, due to the segments of the "blue collar" labour force that were excluded from the mail-out.

Response Rates

The survey specifications called for 400 to 600 completed questionnaires fairly equally distributed among the industries and between employees of foreign- and Canadian-controlled companies within each industry. Out of the 2,245 questionnaires sent, as noted above, 567 were returned completed for an overall response rate of 25.3 per cent.* The number of returned questionnaires and response rates are as follows:

Industry	COMPLETED QUESTIONNAIRES		Industry Response Rate
	From Employees in Canadian-Controlled Companies	From Employees in Foreign-Controlled Companies	
Advertising	54	33	37.2%
Architecture and Engineering Consulting	55	54	40.2
Auto Parts	25	35	15.0
Electronics	52	39	30.3
Mining	68	53	25.3
Pulp and Paper	44	55	17.6
Total:	298	269	25.3%

* It was discovered that some of the employee lists were outdated (i.e. employees no longer with the company or at the same address), and possibly five to ten per cent of the questionnaires sent were never actually received.

The overall response rate of 25 per cent is acceptable for a survey of this type, although somewhat lower than would probably have been achieved had the questionnaire been sent primarily to employees with an involvement in the firms' management or professional work at the middle levels or higher. These employees might be expected to have more interest in, and greater knowledge of, many of the questions asked about the firms' operations and the industry as a whole.

As can be seen by the various response rates among the industries, there were varying tendencies to reply to the questionnaire. As might be expected, the service industries showed the highest rate of return. To achieve a satisfactory number of completed questionnaires, extra mailings were necessary in the Auto Parts and Pulp and Paper industries.

The average response rate for employees of foreign-controlled firms was 24.2 per cent, compared to 26.3 per cent for employees of Canadian-controlled firms. The response rate by employees of foreign-controlled firms and Canadian-controlled firms differed among industries somewhat more than this, although within acceptable limits; this, plus the small number of interviews in each industry, should be borne in mind when interpreting the results for individual industries. Greater statistical reliability can be attributed to the results for all industries combined, as described more fully in a subsequent section.

Questionnaire Design

The questionnaire was designed in five sections, A to E, covering the following subjects:

- Section A: perceived autonomy within the company of the respondent's office, plant, or mine
- Section B: respondent's job satisfaction
- Section C: attitudes toward the respondent's industry and patterns attributed to foreign- or Canadian-controlled companies in the industry
- Section D: blank page for additional comments by respondent
- Section E: respondent's feelings about Canada as a country.

In addition to these five sections there is a series of questions about the respondent himself, asked at the conclusion of the questionnaire. This is entitled "BASIC DATA" in the questionnaire.

Some alterations were made to the standard questionnaire according to the industry or sector involved. The standard questionnaire and its variations are attached as Appendix A. The sections in which alterations were made are as follows:

- Section A: two types, one for the service sector and one for the resource and manufacturing sector
- Section B: common to all questionnaires

- Section C: separate section for each industry, although it was virtually common for the resource and manufacturing sector industries
- Section D: common to all questionnaires
- Section E: common to all questionnaires.

Some companies had objections to certain sections of the questionnaire. In one or two instances, company officials felt that Section A was not quite appropriate to their situation, although they agreed to participate. One company objected to the use of Section B on the grounds that it would affect company morale; it was subsequently deleted from the mail-out for that particular company. There was some objection on the part of two or three foreign-controlled companies to possible bias in the wording of Section C, and in one case Section C had to be deleted from the questionnaire. Care was taken to analyze survey results in the light of these misgivings, and some revisions were made to Section C prior to distribution of the questionnaire to companies in the manufacturing and resource sectors.

LIMITATIONS OF THE SURVEY

Considerable care has been taken in interpreting the results of the survey, primarily in view of the limitations of the sample of employees. The survey is limited due to the way in which it was administered and to some limitations in the sample size.

Survey Administration Limitations

The method selected for obtaining employee samples resulted in specific arrangements being made for each company. Although a common approach was attempted, there were some variations in the procedure for selecting a random sample from employee lists and for questionnaire distribution. Therefore, while every possible measure was taken to ensure that a random sample of each company received the questionnaire, there were some limitations to the total randomness. However, there is no reason to believe that the sample was biased toward certain employees with an assumed predisposition of sentiment.

The survey is restricted in its general randomness in two other respects. First, it is not a random sample of employees of Ontario, for the questionnaires were sent to employees in six industries only. Second, the sample is not truly representative of each industry, since the questionnaire was sent to companies that were selected to participate in the project as a whole.

Sample Size Limitations

It was shown above that there is a fairly even distribution of returns by industry and between employees of Canadian- and foreign-controlled firms. The sample sizes within each industry are relatively small, however, and as a result this report concentrates on aggregates of the tabulated data. The main breakdowns are on a total foreign/Canadian basis and on a service/manufacturing and resource sectors basis.

In this, as in all surveys based upon a statistical sample of the total "universe" being surveyed, it is necessary to consider the range of statistical error for each of the sampled responses. This range may be quite large, particularly for questions which were answered by only some of those sampled, and this has been taken into account when interpreting the results for each question. Since the reader may wish to apply his own interpretation to the survey results, a chart in Exhibit 1, overleaf, is provided for this purpose. The chart gives the "envelope" percentage points within which the sample results are likely to represent the true response (if all employees had been surveyed) 19 times out of 20. This point is covered further in Appendix B.

Suggested
Interpretation

Due to the limitations in the survey, discussed above, it is suggested that the results be interpreted as general indications of the attitudes of employees in Ontario.

EXHIBIT 1

SIZE OF SAMPLE NECESSARY TO BE PRACTICALLY SURE
(19 TIMES OUT OF 20) OF ACCURACY WITHIN LIMITS SHOWN

Number of Interviews	SURVEY ANSWER IN % - LIMITS OF ACCURACY OF SURVEY ANSWER (\pm %)									
	10	20	30	40	50	60	70	80	90	
9-15	20.0	27.0	30.0	33.0	33.0	33.0	30.0	27.0	20.0	
16-35	15.0	20.0	23.0	24.0	25.0	24.0	23.0	20.0	15.0	
36-50	10.0	15.0	20.0	20.0	20.0	20.0	20.0	15.0	10.0	
51-65	9.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	9.0	
66-99	8.0	10.0	15.0	15.0	15.0	15.0	15.0	10.0	8.0	
100-129	7.0	9.0	10.0	10.0	10.0	10.0	10.0	9.0	7.0	
130-159	6.0	8.0	9.0	9.0	9.0	9.0	9.0	8.0	6.0	
160-199	5.0	7.0	8.0	8.0	8.0	8.0	8.0	7.0	5.0	
200-249	4.5	6.0	7.0	7.0	8.0	7.0	7.0	6.0	4.5	
250-299	4.0	6.0	6.0	7.0	7.0	7.0	6.0	6.0	4.0	
300-399	3.5	5.0	6.0	6.0	6.0	6.0	6.0	5.0	3.5	
400 +	3.0	4.0	5.0	5.0	5.0	5.0	5.0	4.0	3.0	

This exhibit indicates the accuracy of a survey answer according to the number of interviews performed, for a 95% confidence level.

Example: Given a number of interviews entering the class 100-129, there are 19 chances in 20 that a survey answer of 30% is accurate within limits of plus or minus 10%; that is, that the true answer, if all members of the public had been sampled, would be between 20% and 40%.

Caution: applicable only to samples chosen by random methods.

II - DESCRIPTION OF THE SAMPLE

In this section we provide a profile of the sample of employees who responded to the questionnaire. The information about the respondents generated by the BASIC DATA section of the questionnaire included biographical data (age, income, sex, marital status, education, place of birth and occupation), union affiliation, number of years with company, and training and employment outside Canada. The most relevant information in each of these categories is presented below, followed by concluding remarks about the sample.

BIOGRAPHICAL DATA

An examination of biographical data of the sample employees, summarized on Exhibit 2, overleaf, reveals that:

- Advertising industry employees are slightly younger than the rest, while A & E employees are the most highly paid.
- A & E employees have the highest educational attainment (90 per cent post high school), while more than half of pulp and paper and mining employees in the sample did not go beyond high school.
- The sample employees were predominantly male, although the advertising and electronics industries contained 30 per cent and 25 per cent females respectively; most employees in the sample were married.
- The service industries were highly represented by owner/professional/managers (about half) while the resource industries had the highest percentage of skilled/unskilled workers (about half).

EXHIBIT 2
BIOGRAPHICAL PROFILE OF RESPONDENTS

	Advertising	Architecture & Engineering Consulting	Auto Parts	Electronics	Mining	Pulp and Paper
AVERAGE AGE	34 years	40 years	40 years	40 years	40 years	40 years
AVERAGE INCOME	\$14,000	\$17,000	\$11,000	\$11,000	\$13,000	\$11,000
MARRIED	63%	83%	90%	80%	86%	86%
MALE	70%	90%	83%	75%	90%	90%
<u>EDUCATION:</u> - high school or less - technical/commercial/ after high school - art College/University/ postgraduate university	30%	10%	45%	32%	54%	56%
	21%	31%	41%	37%	16%	29%
	49%	59%	14%	31%	30%	15%
<u>OCCUPATION:</u> ¹ - owner/manager/professional - "white collar" ² - skilled/unskilled ³	44%	59%	15%	26%	22%	10%
	36%	26%	32%	24%	16%	15%
	8%	10%	38%	36%	45%	53%

Notes: 1. Balance of respondents' positions noted stated.

2. "White Collar" essentially includes office workers who are not owners, managers or professionals.

3. There were very few "unskilled" in this essentially "blue collar" category.

To determine whether the sample was typical of the employees in each industry, some total industry data was assembled and is presented in Exhibit 3, overleaf. When this information is compared to Exhibit 2, it is shown that the sample group has a higher proportion of males and is relatively better paid than the overall industry. However, the relative proportion of one industry to another in terms of income and sex of the sample employees is fairly consistent with industry-by-industry data.

The occupational distribution is of particular interest, since it indicates how representative the sample is of the total work force in each industry. The sample of service sector employees seems fairly typical of the two service industries (although industry-wide figures were not available to check this), while the owner/manager/professional and "white collar" categories for electronics, mining, and auto parts, appear to be relatively over-represented in the sampled employee occupational profiles of those industries.

As explained in Section I, some of the sample distortion may be due to the higher response rate on the part of the upper echelon employees (owner/manager/professional and possibly the "white collar" workers), and by the deletion of segments of the work force from the sample at the request of individual companies. The questionnaire was mailed out to some miners, some employees in woodlands operations, and some plant workers; however, it is in these groups that companies

EXHIBIT 3SELECTED INDUSTRY STATISTICS

	Advertising	Motor Vehicle Parts & Accessories Manufacturers	Radio & TV Communi- cations ¹	Mining	Pulp and Paper
Salary(Average)	\$10,000	\$8,000	\$7,400	\$9,000	\$8,000
Male	51%	82%	60%	N/A	87%
Production Employees	N/A	77%	60%	71% (wage)	75%
Administrative Office Employees	N/A	23%	40%	29%(sa- laried)	25%

Note: 1. Industry closest to resemble electronics.

SOURCE: Statistics Canada

restricted mail-outs in three cases owing to sensitive labour situations, thereby posing limitations on a random survey of all their employees.

A review of the detailed tabulations not presented in this report shows that there are no significant differences in age, income, education, sex, and in occupation between sampled employees of foreign-versus Canadian-controlled companies.

The only significant variance in a foreign/Canadian split occurs in one industry for the "place of birth" category. Fifty per cent of all the sample employees were born in Ontario; however, in the auto parts industry 66 per cent of the employees working for foreign-controlled companies were born in Ontario, as opposed to 20 per cent of those working for Canadian-controlled companies. The others were primarily of European and British origin.

UNION AFFILIATION

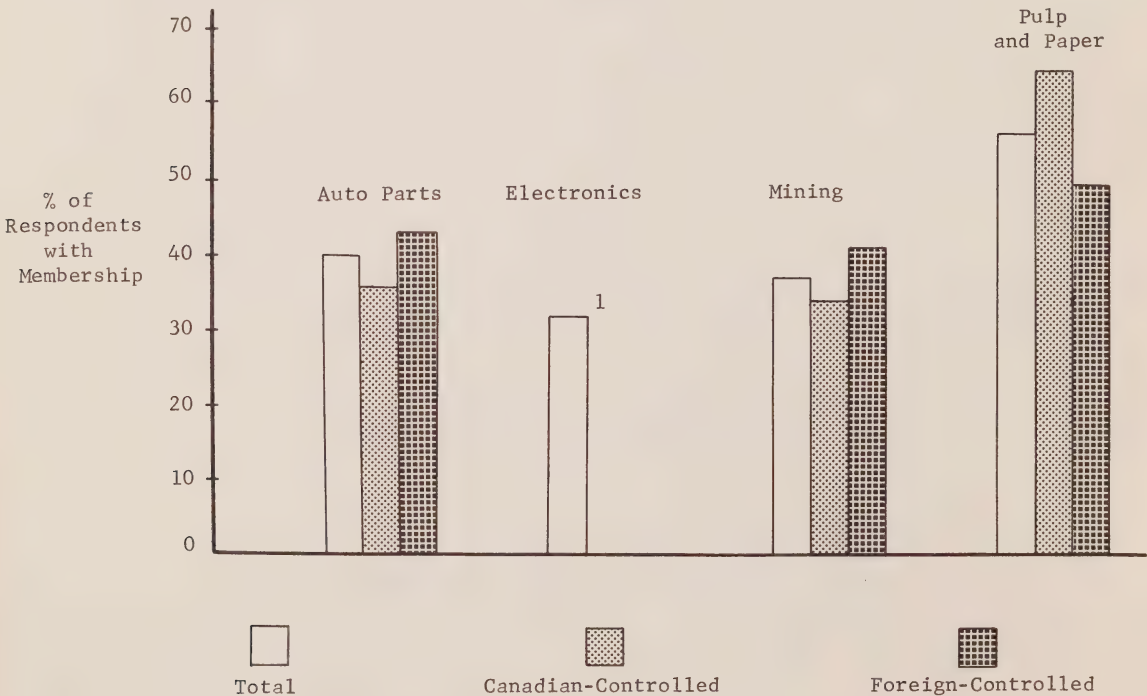
An important check on the sample is revealed by the responses to the question whether the employee was affiliated with a union. Exhibit 4, overleaf, summarizes the results, and shows that:

- If the service sector is excluded, 41 per cent of the sample are members of a union; this provides a fair representation of unionized labour for these sectors.
- The percentage of union members in the sampled employees from foreign- and Canadian-owned firms is even across these two sectors, although marginally different for each industry.

EXHIBIT 4

MEMBERSHIP IN UNIONS

Segment of Sample	Membership As a % of Total	Foreign- Controlled Companies	Canadian- Controlled Companies
Total Sample (N = 567)	27%	29%	26%
Manufacturing/Resource Sector Only (N = 371)	41%	41%	41%



Note: 1. Results are not shown since only two firms are represented.

Specific union affiliations are shown on Exhibit 5, overleaf. The foreign/Canadian split per union shows that some unions are represented by employees of Canadian-controlled firms and some by foreign-controlled firms. This result stems from the very small sample of firms for whom the sample employees worked in each industry.

EMPLOYMENT HISTORY AND FOREIGN EXPERIENCE

From examining the responses to "number of years with current company", "number of years employed in industry" as illustrated in part in Exhibits 6 and 7, pages 21 and 22 respectively, it is worth noting that:

- There is a tendency to shift more frequently from company to company in the service sector, especially in advertising; the pulp and paper industry tops the list in longevity of employment, both being employed in the same company and in the same industry.
- The foreign/Canadian breakdown was not particularly significant on an across-the-board basis, although employees of Canadian-controlled firms seemed to remain slightly longer in the same industry and with the same firm.

In an examination of the foreign/Canadian split per industry in the pulp and paper industry, however, there was a significant difference. Employees of Canadian-controlled companies showed greater employment longevity compared to that of foreign-controlled pulp and paper companies.

In terms of either education or employment outside Canada, the table on page 23 shows the results by industry:

EXHIBIT 5SPECIFIC UNION AFFILIATIONS

	Total	Auto Parts	Electronics	Mining	Pulp and Paper
TOTAL AFFILIATED ¹	153	24	29	45	55
Mine, Mill and Smelter Workers	12%			42%	
United Paper Makers	10				29%
United Rubber Workers of America	5	33%			
Pulp & Paper & Sulphite	9				26
United Steel Workers	9				
United Electrical Workers	20	13	76%	2	6
U.A.W.	6	37			
U.P.I.U.	2				6
Lumber & Sawmill Workers Union	3				9
Canadian Union of Base Metal Workers	3			11	
Operating Engineers	3			2	6
International Chemical Workers	2				6
Miscellaneous	16	17	24	11	12
Not Stated					
Total:	100%	100%	100%	100%	100%

Note: 1. Union Titles are as specified by respondents.

EXHIBIT 6

NUMBER OF YEARS WITH CURRENT COMPANY

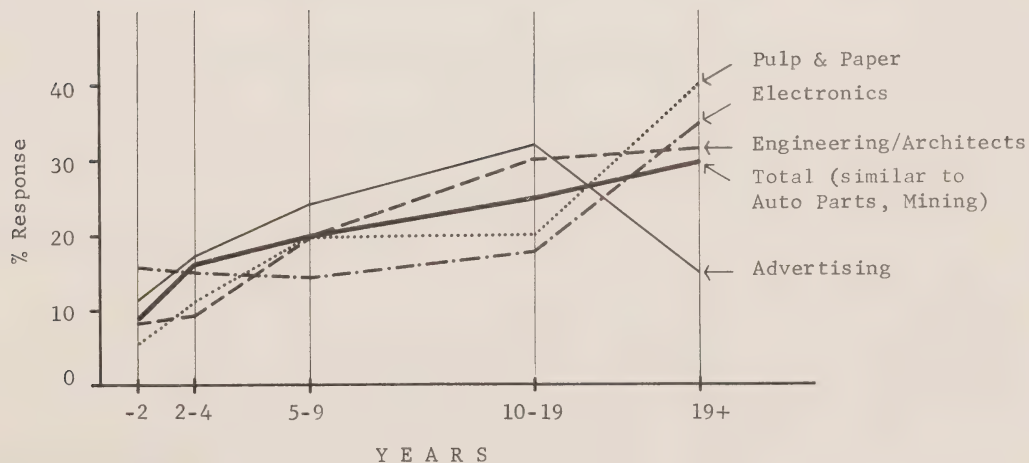
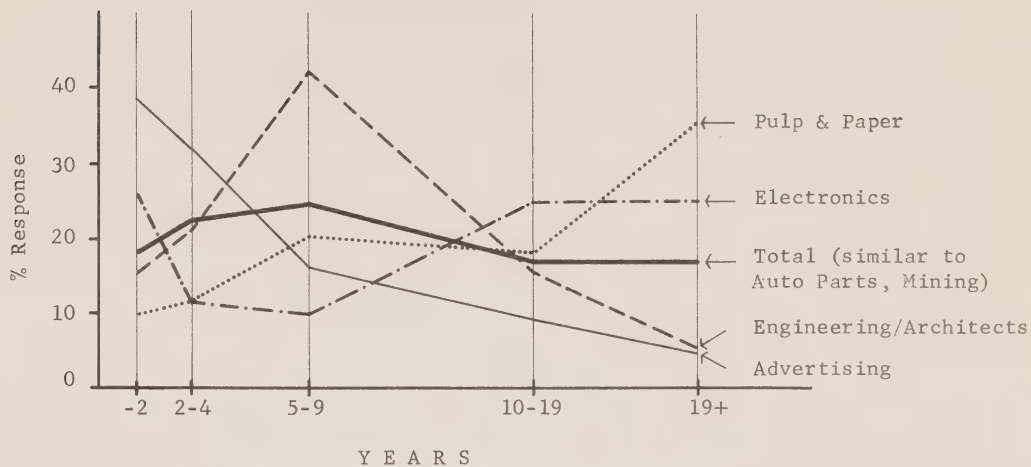
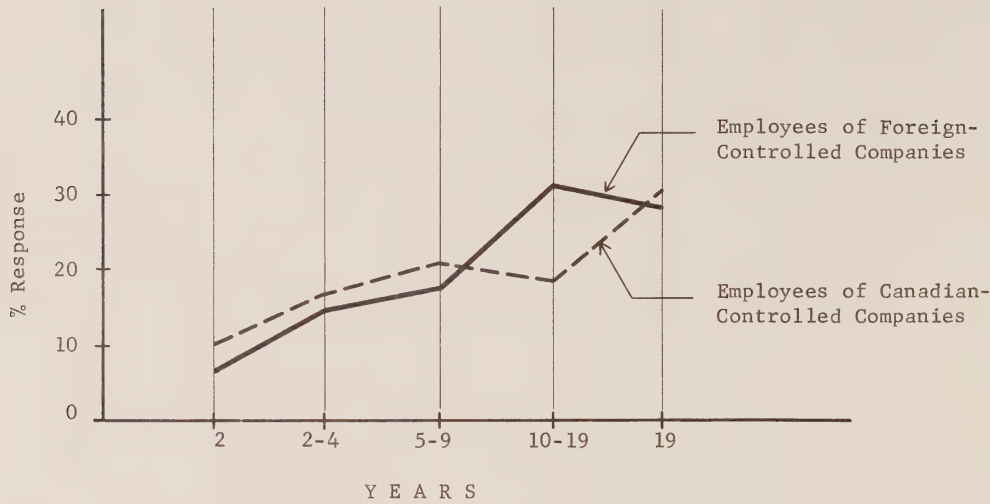


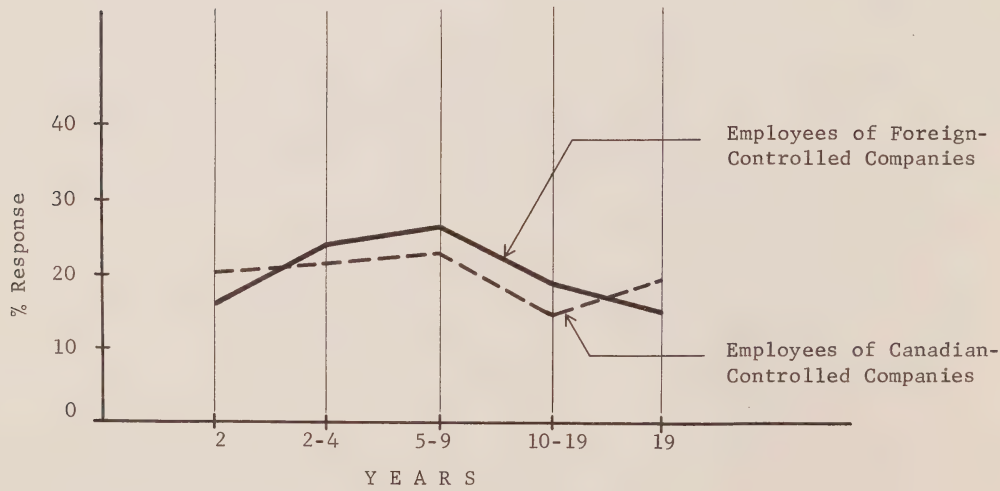
EXHIBIT 7

COMPARISON OF EMPLOYEES OF FOREIGN-CONTROLLED
vs. CANADIAN-CONTROLLED COMPANIES

A: NUMBER OF YEARS EMPLOYED IN INDUSTRY



B: NUMBER OF YEARS WITH CURRENT COMPANY



PERCENT OF TOTAL RESPONDENTS

Industry	Employed in Same Industry Outside Canada	Part or All of Education Outside Canada
Advertising	30%	31%
A & E	34	34
Auto Parts	23	30
Electronics	13	20
Mining	3	13
Pulp and Paper	6	6

The main points about these results are that:

- The service sector employees followed by those in the manufacturing sector show significant numbers of the sample who have worked outside Canada, while in the resource sector very few of the respondents have worked outside Canada.
- A slightly greater number of the sample have received all or part of their education outside the country than the number that have worked outside Canada.

The countries named most frequently as places where the respondents worked or went to school were the U.K. and the U.S. with about an even split between the two countries, although there was a significant group of respondents in the electronics industry who have previous experience in the U.K.

The only foreign/Canadian split difference was in the advertising industry, where about half of the employees of foreign-controlled advertising agencies stated they had worked outside Canada, as opposed to less than one-fifth of the respondents employed by Canadian-controlled agencies. Since most of the foreign-controlled agency replies were from one agency, this result should be treated with some caution.

CONCLUSION

The sample of employees responding to the questionnaire stands up fairly well considering the difficulties in generating the sample. There appears to be a fairly even foreign/Canadian breakdown in the biographical data category, among those who are unionized, and in employment history. In fact, the roughly proportional split in these categories between employees of foreign- and Canadian-controlled firms implies that the employees of both types of companies are quite similar in background.

Examination of the data on an industry basis shows that the sample might not be as representative within each industry grouping. The union affiliation is scattered among several unions, and there are some other quirks in the foreign/Canadian split in most of the industries. The caution expressed in Section I with respect to specific industry analysis should again be emphasized.

III - PERCEIVED AUTONOMY

Section A of the questionnaire was designed to identify whether the employees of foreign-controlled companies felt that their company was relatively independent from the foreign parent. This section of the report explains the design of the questions in Section A and outlines the results of this portion of the survey.

QUESTION DESIGN

Control Questions

Besides asking foreign-controlled companies how they felt about the relationship between the subsidiary and parent company, control questions were introduced into Section A. The first check was to ask both Canadian- and foreign-controlled company employees the same questions. In this way the results of the two could be compared to determine how employees generally reacted to the subject.

The second means of comparing the results was to measure employees' perception of the independence of their own branch vis-a-vis their head office (if they did not already work at head office) and where relevant, their perception of the company's independence vis-a-vis its offices outside Canada.

Respondent Categories

There are three categories of respondents built into the structure of this section of the questionnaire. The first is of all

service sector employees; the second combines the office employees of the manufacturing and resource sectors; the third groups the plant or mine employees of the manufacturing and resource sectors.

There are two versions of Section A in the questionnaire: one for office workers and one for plant/mine employees. The question content was basically the same in both versions and related to perceived autonomy, working relationship and type of decisions which involved contact with another office. In the case of office workers in all industries, they were isolated into either a branch office employee or a head office employee. Plant and mine workers, on the other hand, were not divided into head office and branch plants. The number of returns and a summary of the subjects addressed by the questions in Section A is shown in Exhibit 8, opposite.

The results are summarized below, first in terms of the perceived autonomy vis-a-vis foreign offices, and second, in terms of branch/head office relationships in Canada.

PERCEIVED AUTONOMY

The results are described first for the service sector and office employees of the manufacturing and resource sectors - which may be referred to as the "white collar" category, and second for the plant or mine employees of the manufacturing and resource sectors - or the "blue collar" workers.

"White Collar"

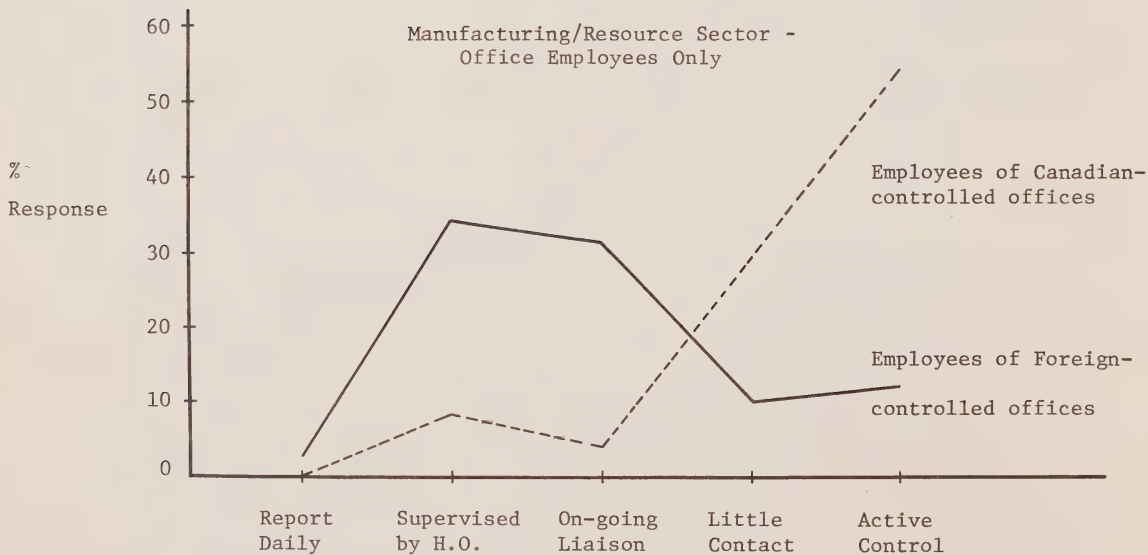
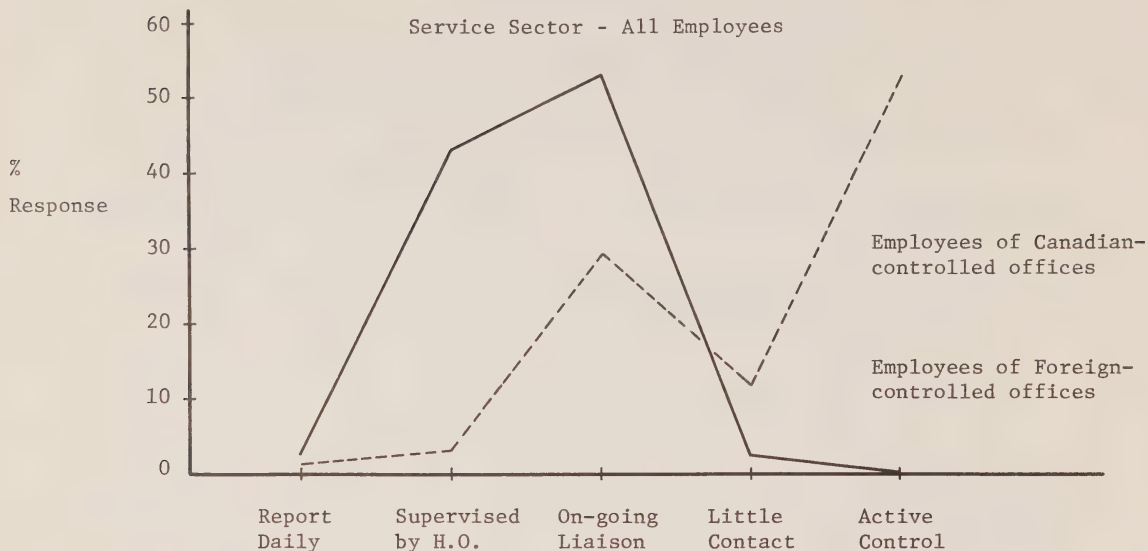
Exhibit 9, page 28, shows the perceived relationship of

EXHIBIT 8STRUCTURE AND RESPONSE PROFILE OF SECTION A

Response Groups	Questions Asked	COMPLETED RETURNS		Total
		Foreign-Controlled	Canadian-Controlled	
All <u>service</u> sector employees	<ul style="list-style-type: none"> - <u>branch</u> office communications and approval relationships. - <u>foreign</u> office communications and approval relationships. 	87	109	196
<u>Office</u> employees of manufacturing and resource sectors	Same as above but in a different sequence	52	70	122
<u>Plant</u> or <u>mine</u> employees of manufacturing and resource sectors	- modified set of questions on foreign office communications and approval relationships.	130	119	249

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EXHIBIT 9

CANADIAN OFFICES ASSOCIATION WITH OFFICES
OUTSIDE CANADA

the Canadian company to its offices outside Canada. Included in this exhibit are only the employees who indicated that their company had offices outside Canada. The main observations to be drawn from the replies from the questions in Section A related to this issue are as follows:

- Employees of foreign-controlled firms in the service sector perceive that they are "independent but have an on-going liaison", or "independent in day-to-day matters but fall under the overall supervision", of the office(s) outside Canada.

On the other hand, more than half of the employees of Canadian-controlled firms in the service sector feel that their company, "actively controls" offices outside Canada, while less than half believe that there is either "little on-going contact" or else "on-going liaison".

- The office employees of foreign-controlled firms in the manufacturing resources sectors also feel that "on-going liaison" or "fall under overall supervision" aptly describes their companies' position vis-a-vis offices outside Canada.

More than half of the office employees in Canadian-controlled firms in the manufacturing/resource sectors feel that they "actively control" the offices outside Canada, while a third feel that there is either "little on-going contact" or else "on-going liaison".

The results show that employees of foreign-controlled firms tend to recognize their subsidiary/foreign parent relationship; Canadian-controlled company employees also tend to (correctly) perceive the subsidiary nature of their offices outside Canada. Although this fundamental relationship seems to be largely grasped by the employees of foreign-controlled firms, we interpret their replies to mean that the Canadian subsidiary is not overly controlled by the foreign parent, at least in the eyes of its employees.

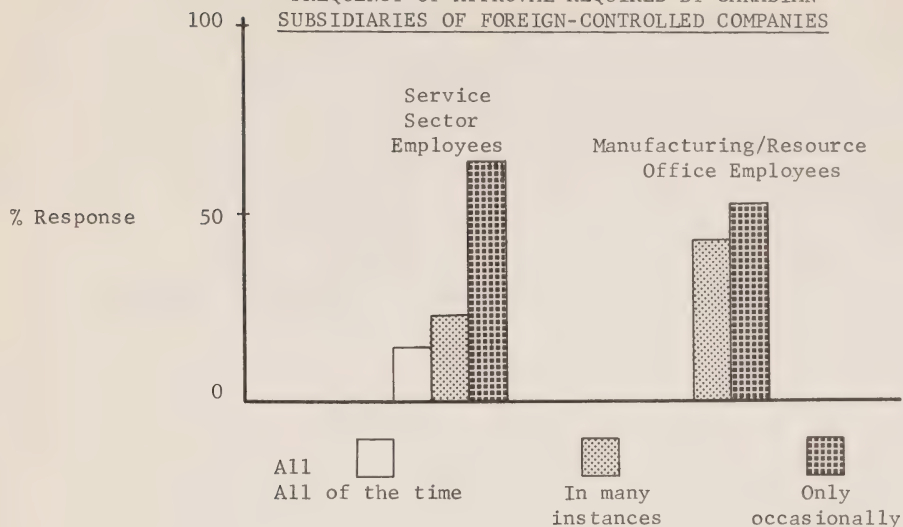
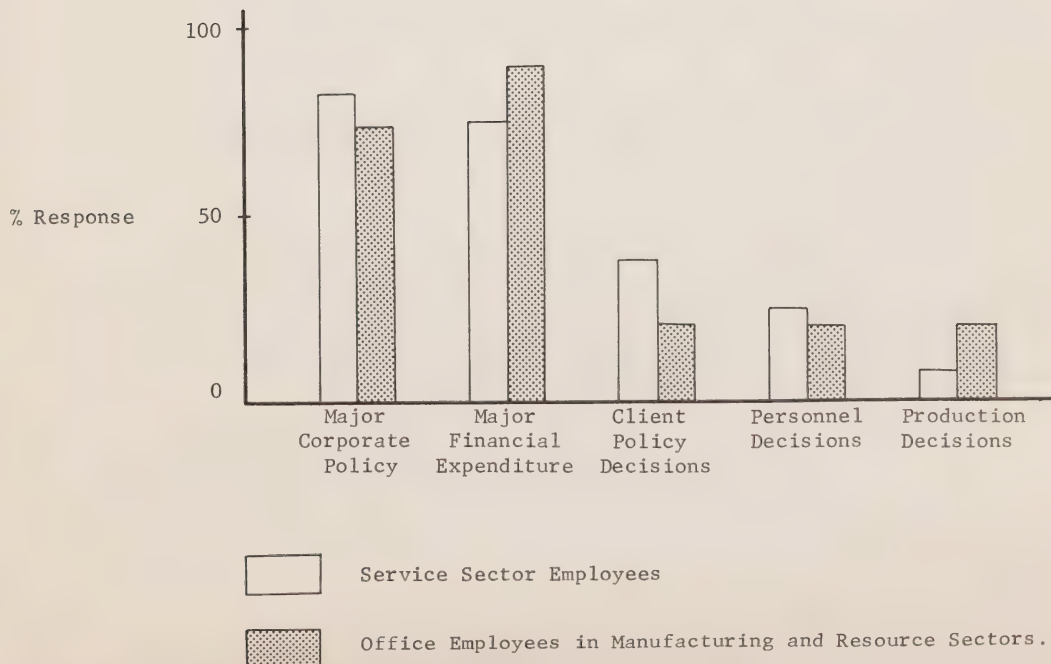
More evidence is provided on this subject in the question pertaining to possible approvals required from the foreign parent. The results are shown in Exhibit 10, opposite, and the following observations are made:

- Most of the employees of foreign-controlled companies in the service sector feel that their office requires approval from the outside office, but that this approval is infrequently required.
- Most of the office employees of foreign-controlled companies in the manufacturing and resource sectors feel their company requires approval from an office outside Canada; the approval frequency is divided roughly, equally between "in many instances" and "only occasionally".
- The type of decision requiring approval in the service sector is primarily related to major corporate policy and financial expenditures questions; this is similar to the manufacturing/resource sectors.

Again the results seem to show that the foreign-controlled firm's employees recognize the basic subsidiary relationship of their own company vis-a-vis the foreign offices. However, the measure of foreign control is felt to be relatively light as indicated by the replies to the question of approval frequency.

A noteworthy difference between the service sector employees and the office workers of the other sectors is the spread between them in the "yes" response to the approval required question. A possible explanation is the somewhat greater visibility of the foreign-controlled offices in the service sector. However, the replies to approval frequency, type of approval and the subsidiary/foreign parent relationship

EXHIBIT 10

FREQUENCY OF APPROVAL REQUIRED BY CANADIAN
SUBSIDIARIES OF FOREIGN-CONTROLLED COMPANIESTYPE OF DECISION INVOLVED FOR
APPROVAL BY FOREIGN OFFICES

are similar for both groups of employees. The perception of relative autonomy is probably about the same for the service sector employees as the employees of the manufacturing/resource sectors.

"Blue Collar"

The table below presents the results about the perceived re-reporting relationship of mine and plant employees of foreign- and Canadian-controlled companies.

MINE/PLANT EMPLOYEES REPORTING RELATIONSHIPS

Respondent/s Mine/ Plant Reports to	Foreign- Controlled	Canadian- Controlled
Canadian Head Office	51%	82%
Canadian Branch Office	22	11
Office outside Canada	32	7
Total:	100%	100%

The main points of this table are as follows:

- The bulk of employees in both foreign- and Canadian-controlled companies perceive that their plant/mine reports to an office - either branch or head office - in Canada.
- Almost a third of the plant/mine employees of foreign-controlled companies perceive that their plant or mine reports to offices outside Canada.
- Just under seven per cent of plant/mine employees of Canadian-controlled companies feel their mine or plant reports outside Canada.

The explanation of these results is difficult without knowing the number of individual mines or plants which report directly to a foreign office. If it is an impression that reflects the true reporting

relationship, then a significant portion of employees work in mines or plants that bypass Canadian offices, and report directly to foreign offices.

The Canadian-controlled companies' employees who feel that their plant or mine reports outside the country are a small, but curious minority. It might be assumed that they are either not quite sure of the ownership of their company, or believe that it is somehow foreign-controlled.

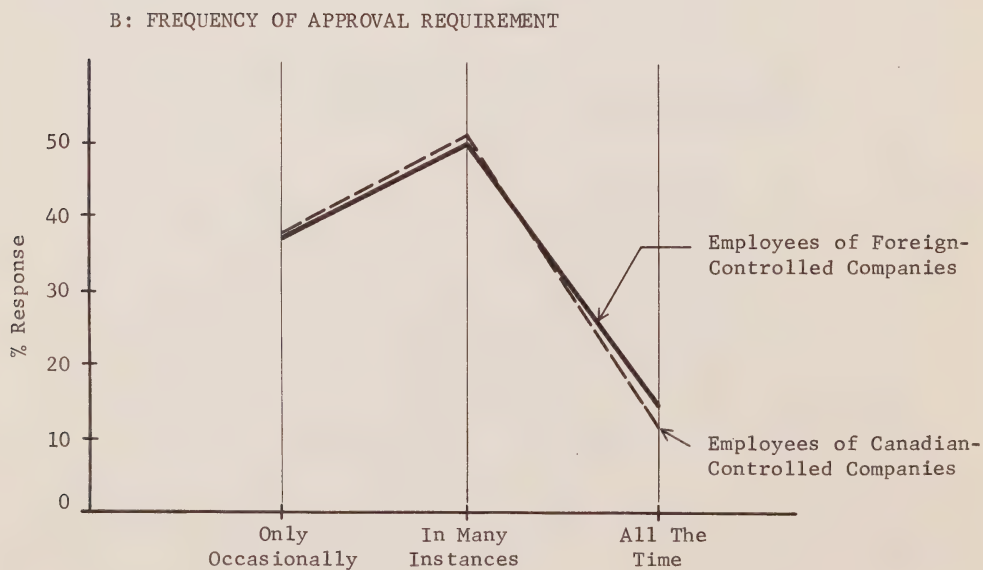
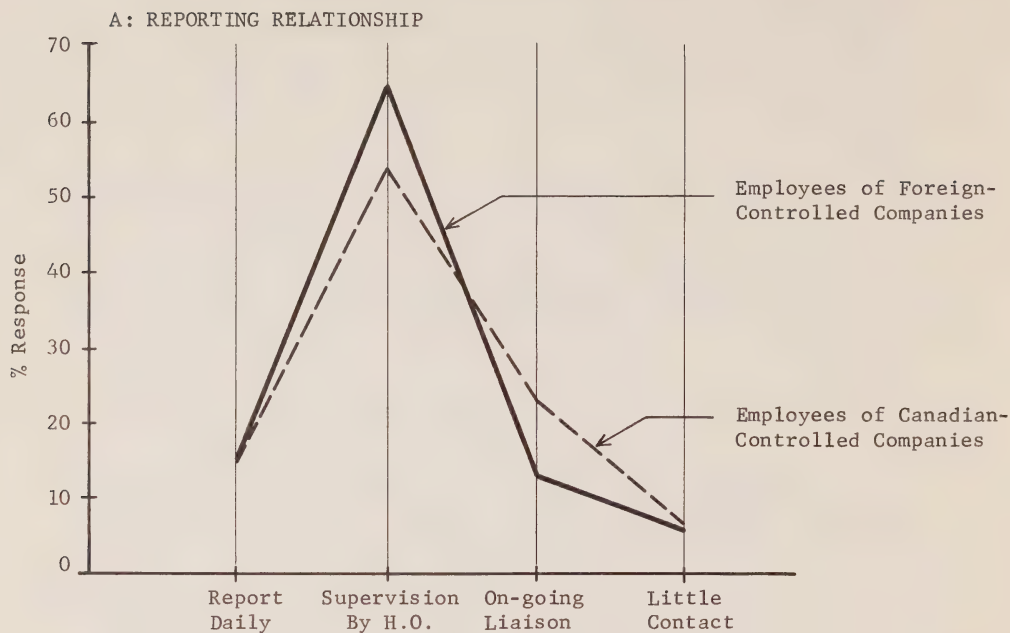
Exhibit 11, overleaf, shows the differences in perception of autonomy between the employees of foreign-controlled and Canadian-controlled companies. From this exhibit, we may observe the following:

- Employees of foreign-controlled firms that work in a plant or mine feel that they are somewhat more tightly controlled by the office to which they report than their counterparts working for Canadian-controlled companies.
- Almost all employees of both foreign- and Canadian-controlled firms feel that approvals are required from the office to which they report.

In interpreting the results of this question it should be understood that Exhibit 10 does not separate out those plant/mine employees who believed that they reported directly to a foreign office. As the table on page III-5 shows, most answered that their mine or plant reports to a Canadian head office, while some reported to a Canadian branch office and the remainder to an office outside Canada.

EXHIBIT 11

MINE/PLANT EMPLOYEES PERCEIVED
ASSOCIATION WITH SUPERVISING OFFICE



Given that the question was addressing the relationship between mine/plant and the next most senior office, whether in Canada or not, it does provide some opinions on the subject of perceived autonomy. There is a statistically significant difference between the perceived amount of control exercised by the foreign-controlled company, in contrast to the Canadian-controlled company.

When the "approval required" replies are examined (see Exhibit 11), however, there seems to be little difference between the autonomy perceptions of foreign- and Canadian-controlled company employees. In any case, since the relative autonomy perceptions are primarily within Canada, there is no further evidence to suggest that employees perceive foreign-controlled firms as being unduly controlled by their foreign parents.

"BRANCH OFFICE" CONTROL QUESTION

As discussed above, a set of control questions was put in Section A of the questionnaire. These questions related to the autonomy of the office of the respondent vis-a-vis the office to which his office reported. The number of employees who stated that they worked in a branch* office is as follows:

	% of Respondents Stating they worked in a Branch Office
<u>Service</u> sector employees	30%
<u>Office</u> workers in manufacturing/ resource sectors	50%

* It is possible that foreign-controlled companies mistook "branch" for the head office in Canada relative to the foreign parent. However, the foreign/Canadian split for "branch" office replies is about equal. Therefore, it is considered that most of the branch office employees were in branches in Canada.

Exhibit 12, opposite, contrasts the replies between (a) the branch and Canadian head office, and (b) the Canadian subsidiary and its foreign parent as shown in the replies of the employees of foreign-controlled firms. Exhibit 13, page 39, makes the same comparison with respect to the perceived approval frequency and type of decision for which approval is required. The main observations are as follows:

- Employees of foreign-controlled firms feel that the Canadian subsidiary of the foreign parent has greater autonomy than employees of both Canadian- and foreign-controlled firms feel exists between the Canadian branch office and the Canadian head office.
- In terms of approvals, the situation is less clear; in the service sector, the Canadian subsidiary reports relatively more frequently to its foreign parent, while in the manufacturing/resource sectors the more frequent approvals are required by the Canadian branch relative to its Canadian head office, as perceived by their employees.

The comparisons are fairly crude, but they suggest that employees feel that a Canadian subsidiary of foreign company is no more tightly controlled than a Canadian branch by its Canadian head office.

The results also indicate that perception of dependence at the branch level occurs in both Canadian-controlled and foreign-controlled companies. Therefore, the typical employee of either the branch of the Canadian-controlled or foreign-controlled company appears to perceive about the same reporting relationship, and the foreign or Canadian control distinction may be less important than the fact that he does report to a higher office.

EXHIBIT 12

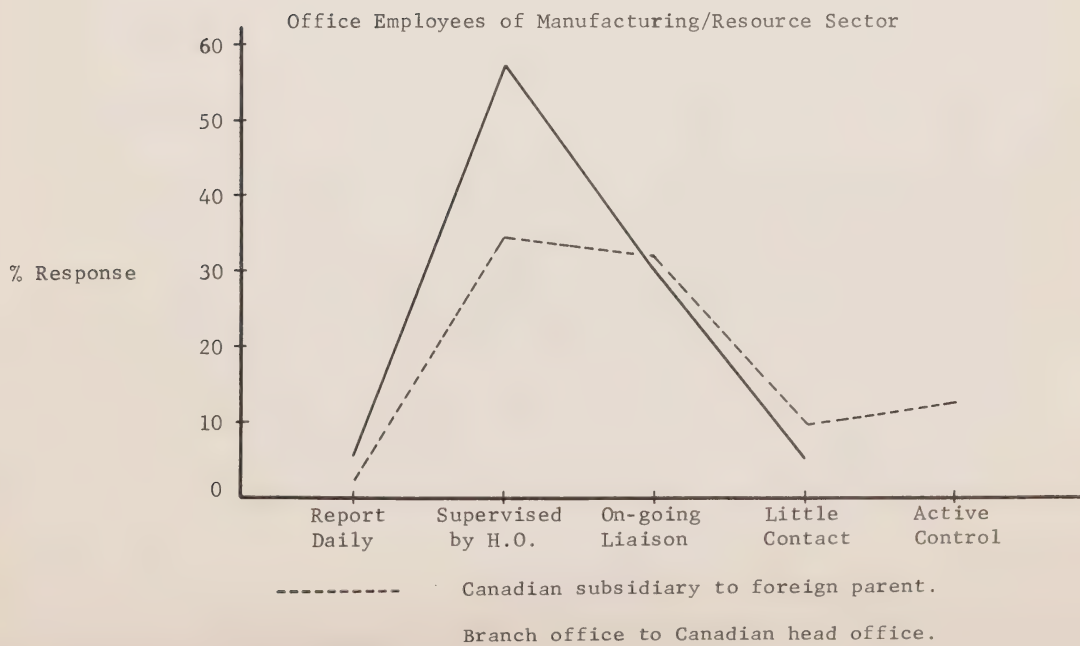
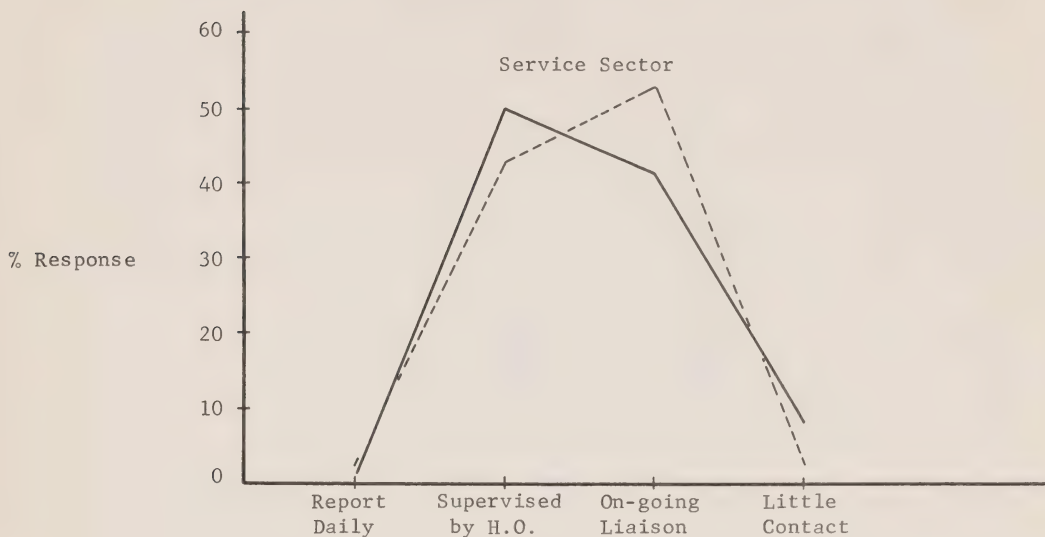
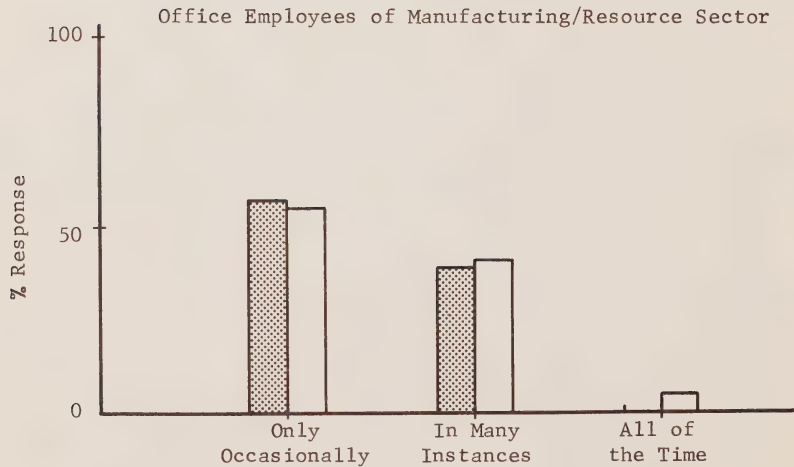
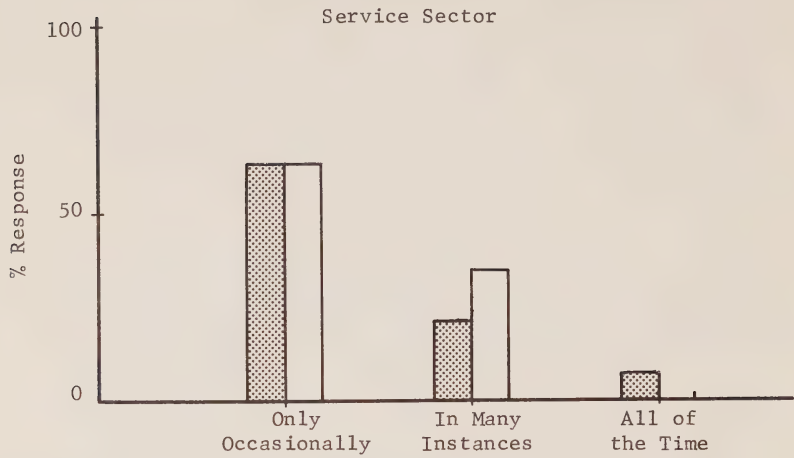
COMPARISON OF AUTONOMY: BRANCH OFFICE TO CANADIAN
HEAD OFFICE VS. CANADIAN SUBSIDIARY TO FOREIGN PARENT

EXHIBIT 13

COMPARISON OF APPROVAL: BRANCH OFFICE TO CANADIAN
HEAD OFFICE VS. CANADIAN SUBSIDIARY TO FOREIGN PARENT



Canadian subsidiary to foreign parent.

Branch office to Canadian head office.

Branch Autonomy
Related to Other Factors

The number of respondents within each industry is too small to make many meaningful comparisons among them or between employees of foreign- and Canadian-controlled firms within any industry. One exception is the auto parts industry where the detailed results of the survey show that there is a large difference in perceived autonomy - the employees of Canadian-controlled companies feel they are relatively more autonomous.

We attempted to relate income and education of the respondents to their perception of relative autonomy as a branch operation. There is some statistically significant evidence to support a perception of greater independence by those with the higher income. This holds true for the respondents in all three sectors. The fact that employees in the lower income brackets feel that they are more tightly controlled is probably an indication of their perception based on their status within the company.

CONCLUSION

The results suggest that employees of foreign-controlled companies perceive some measure of dependence on the foreign head office. Overall, though, this dependence appears to be relatively light, since the perceived control appears relatively soft and approval requirements infrequent.

IV - JOB SATISFACTION

One of the questions that the survey was designed to answer was whether employees felt any better about working for a Canadian-controlled as compared with a foreign-controlled firm. Besides asking the question directly, we attempted to find out indirectly through a series of questions relating to the employee's overall satisfaction with his job. In this way we could then compare the employees of foreign-controlled with those of Canadian-controlled firms on a more neutral basis to determine whether there were differences in job satisfaction.

QUESTION DESIGN

Section B of the questionnaire was designed to determine whether there were any differences between employees of foreign-controlled and Canadian-controlled firms in terms of job satisfaction. Fifteen questions asked the respondent to indicate the degree to which he was satisfied (in six categories from "very satisfied" to "very dissatisfied") with various aspects of his job with a final question asking the respondent to list the most likely reasons which might cause him to leave his job.

These questions have been tested and used previously in questionnaires designed primarily to determine job satisfaction for individual employers. The purpose of this section in this survey was to compare the results between two sets of employees, rather than acquire some

idea as to what employees were satisfied about. Consequently, the results and analysis concentrated on the differences rather than the nature of the indicated job satisfaction.

Another question in the fifth section of the questionnaire directly enquired whether the employee had any preference for working in a Canadian-controlled rather than a foreign-controlled firm.

FOREIGN/CANADIAN DIFFERENCES

Aspects of Job Satisfaction

Exhibit 14, opposite, compares the responses between employees of foreign-controlled firms and those of Canadian-controlled firms. From these responses we would conclude that:

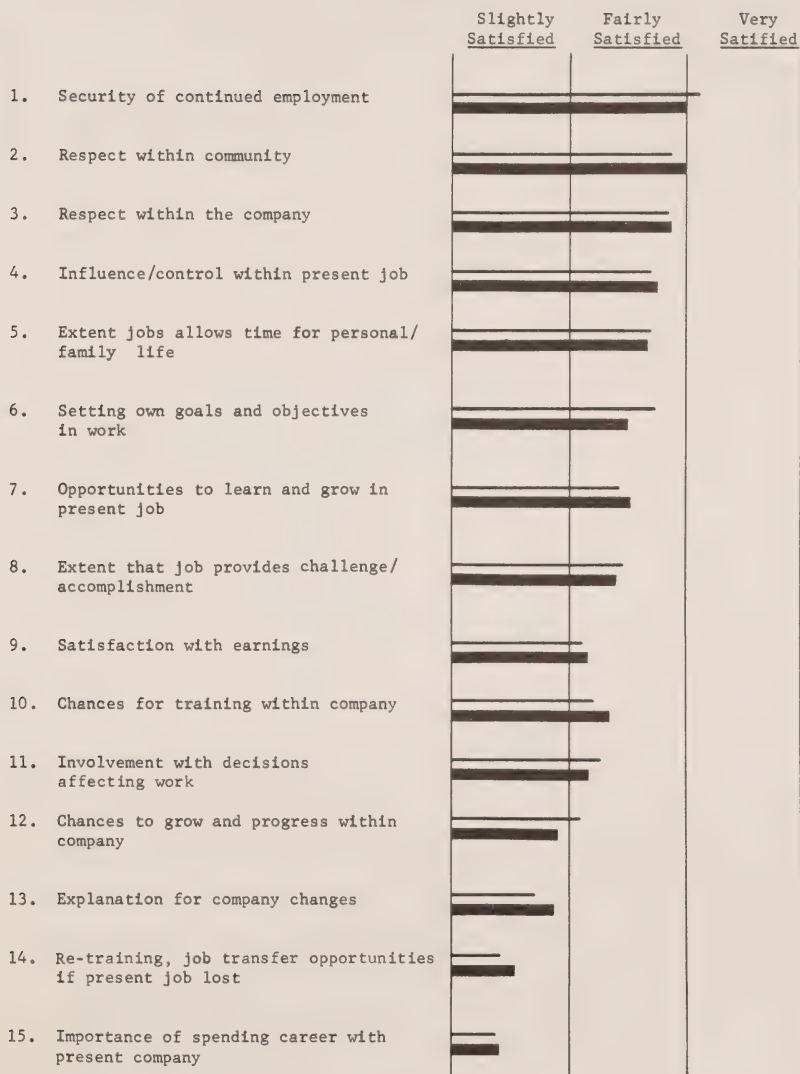
- There is no statistically significant difference on any aspect of job satisfaction between employees of foreign- and Canadian-controlled companies.

As the chart shows, there are some differences in responses between employees of foreign-controlled and Canadian-controlled companies for each question. For nine questions the employees of foreign-controlled companies appear to be slightly more satisfied with those aspects of their jobs, as opposed to six times where the employees of Canadian-controlled companies appear to be more satisfied. However, the differences between the two sets of replies for each aspect of job satisfaction are not statistically significant.*

* An explanation of the test for statistical significance is provided in Appendix B.

EXHIBIT 14

FOREIGN/CANADIAN COMPARISON ON JOB SATISFACTION
ALL EMPLOYEES



_____ Employees of Canadian-controlled firms
 ██████████ Employees of Foreign-controlled firms

Sector Differences

As well as determining the differences between employees of foreign-controlled and Canadian-controlled companies for individual aspects of job satisfaction, an attempt was made to compare differences between the sets of employees within sectors (The sample was too small to draw any conclusions within each industry). Exhibit 15, opposite, shows the overall job satisfaction comparison between employees of foreign-controlled and Canadian-controlled firms in the service, manufacturing, and resource sectors. This comparison shows that:

- Employees of foreign-controlled firms have a higher degree of job satisfaction than employees of Canadian-controlled companies in the service sector, a lower degree of satisfaction in the resource sector, and about the same degree of job satisfaction in the manufacturing sector.

The differences shown in the exhibit are statistically significant for the service and resource sectors, but not so for the manufacturing sector.

The results of this survey for the service sector tend to confirm our impressions based on interviews with senior management in the companies we studied in the two service sector industries. It is not certain, however, whether the sample of companies selected for analysis was typical of all the firms in these two industries. In these two industries, it seemed that there was high employee morale in two or three foreign-controlled firms, while we received the impression that the morale was lower in one or two Canadian-controlled firms. In yet another

EXHIBIT 15FOREIGN/CANADIAN COMPARISON BY SECTOR
OF TOTAL SCORE ON JOB SATISFACTION

case, a Canadian-controlled firm in the service sector did not permit the distribution of the questionnaire until the job satisfaction questions were deleted - on the grounds that it might have an adverse impact on morale.

Job Dissatisfaction

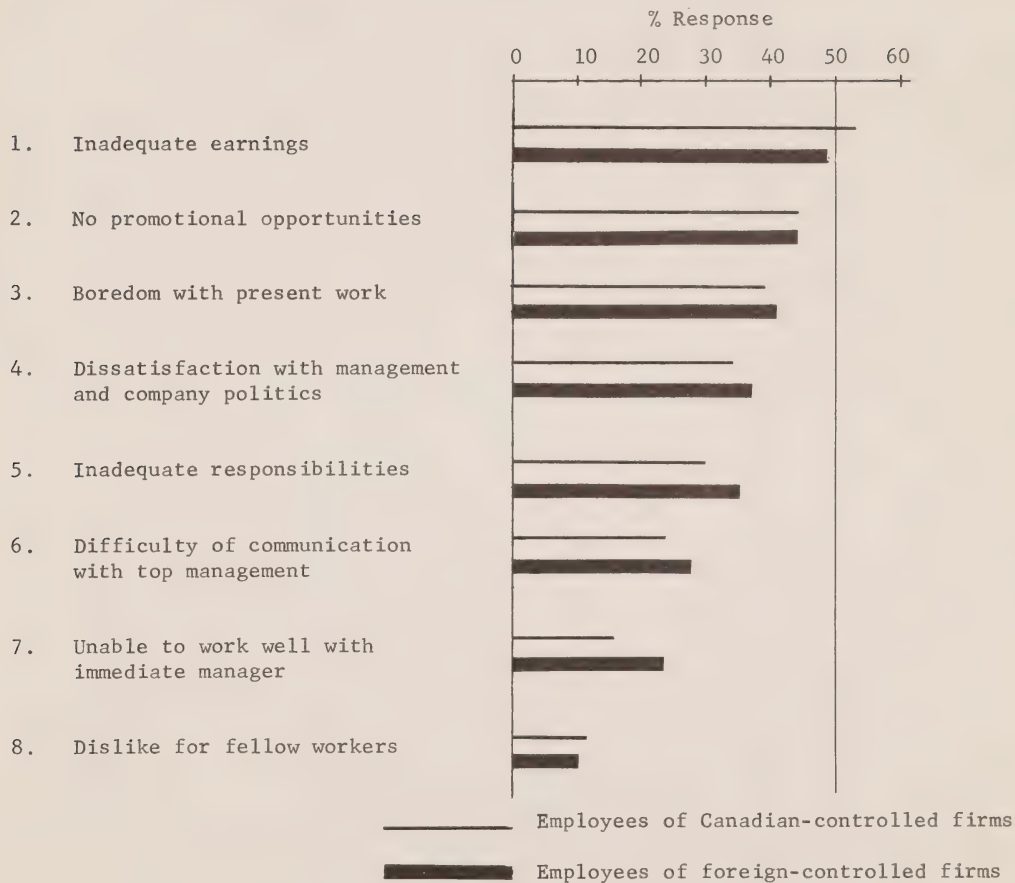
The results of the question on the reasons that would cause the employee to leave his present company are shown in Exhibit 16, opposite. These results seem to indicate that:

- There is no significant difference between employees of foreign-controlled and Canadian-controlled companies in terms of dissatisfactions which might likely cause an employee to leave his present company.

This question was not designed to determine whether one set of employees was more likely to leave his job than another set of employees, but rather to elicit the type of dissatisfaction most likely to cause a respondent to resign his job. In total, the responses are very close and although there are percentage differences between employees of foreign- and Canadian-controlled firms, there are no statistically significant differences. Both groups also ranked the factors in the same order.

Preference for Canadian-Controlled Company

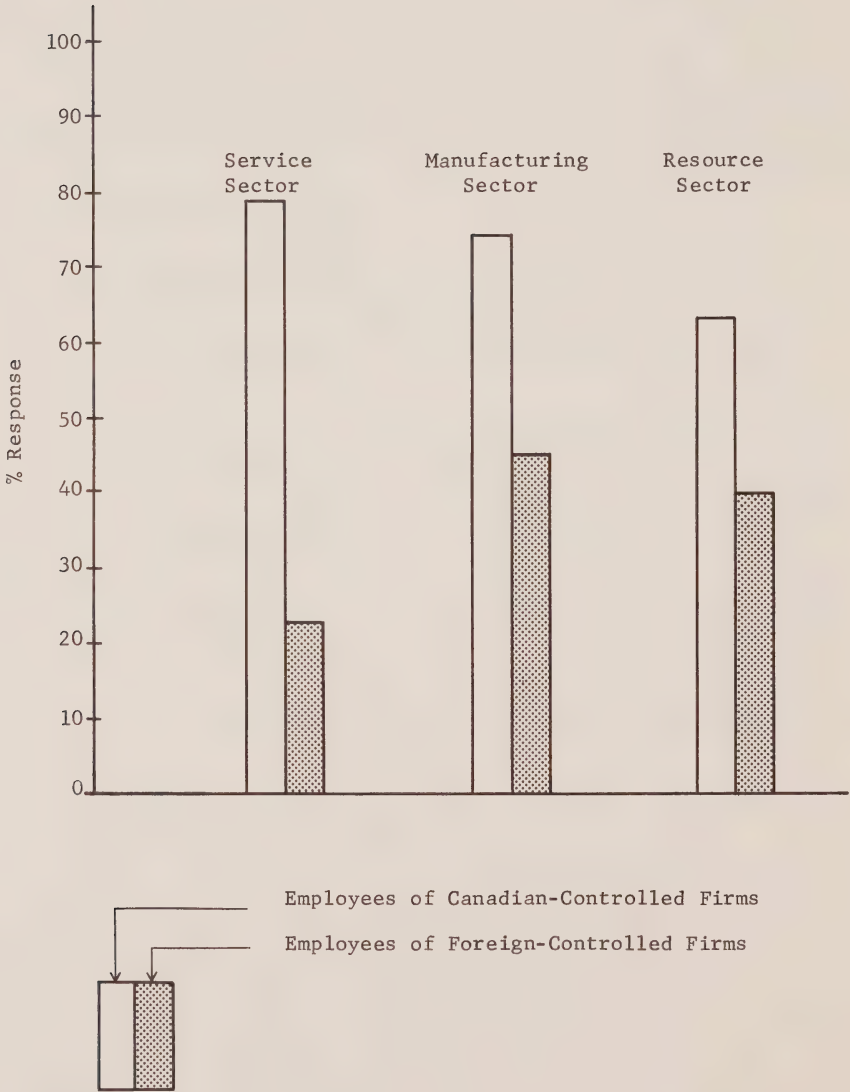
The replies to the direct question of preference for working for either a Canadian-controlled or foreign-controlled firm are presented in Exhibit 17, page 48. They show that:

EXHIBIT 16DISSATISFACTION MOST LIKELY TO
CAUSE RESIGNATION - ALL EMPLOYEES

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EXHIBIT 17

PREFERENCE FOR WORKING IN A CANADIAN-CONTROLLED FIRM



- There is a strong preference for employees of Canadian-controlled firms to work for Canadian-controlled firms, while employees of foreign-controlled firms do not express such a strong preference for working for a Canadian-controlled company - i.e. 72 per cent compared to 37 per cent.

The responses to this question would appear to be consistent with the positive measure of job satisfaction indicated by both sets of employees. Both are satisfied with their own companies and hence see no good reason to prefer the other type of company.

To an extent the results may reflect a reinforcement of the respondent's current position - i.e. to justify his present position it is consistent that he be positive about preferring to work where he is.

A related question is whether employees seek employment with either foreign- or Canadian-controlled firms in the first place or whether they are just satisfied when they get there. To some extent their preference for working for a foreign-controlled or Canadian-controlled firm may be post-employment rationalizations, or they may reflect a conscious desire on the part of an employee to work for one type of firm or the other.

These questions must remain somewhat speculative, particularly at the level of the employee sample. We are inclined to believe the employee preferences are primarily the result of their overall satisfaction on the job and have very little to do with whether the company is foreign- or Canadian-controlled.

EMPLOYEE JOB
SATISFACTION IN GENERAL

Character of
Job Satisfaction

Although they showed few significant differences in job satisfaction between employees of foreign-controlled and Canadian-controlled companies, the results for these questions may assist in further understanding the overall job satisfaction of the Ontario employee of large Canadian companies.

From the ranking of job satisfaction for various aspects of the job, (see Exhibit 14 on page 44), it appears that employees in the sample were basically satisfied with their jobs, especially in terms of security and respect. They also appear to be satisfied with the job as is (influence/control within present job, setting of goals and objectives in work, opportunities and growth in present job, satisfaction with earnings). However, employees appear to be satisfied but relatively less so with the aspects of the job as it could be (chances for training within company, opportunities if present job lost, chances to grow and progress within company). There is also some indication of relatively less satisfaction with the company as a whole (explanation of company changes, involvement in decisions affecting work, and importance of staying with the company).

With this kind of job satisfaction, it might be concluded that these employees represent a labour force that is relatively satisfied,

and one that feels fairly comfortable about the status quo. However, the employee job satisfaction replies might also be interpreted as indicative of a certain uneasiness about aspects of the job related to upward mobility and how employees are treated by their employers. In either case, the general level of job satisfaction registered by employees does not reflect the concerns regarding foreign ownership expressed elsewhere in the survey response. It seems that these concerns are more general in nature, possibly reflecting the cumulative impact of foreign ownership in Canada, and do not relate to the specific firm for which the employee works.

Job Satisfaction
By Industry_____

The job satisfaction scores by industry are shown in Exhibit 18, overleaf. The higher job satisfaction for advertising employees relative to other industries is the only statistically significant difference in a comparison among industries.

An explanation for the relatively higher advertising rating might be that the job for those in advertising is an important aspect of life, whereas many employees in the other industries, particularly in "blue collar" jobs, may achieve greater satisfaction in life outside the job.

CONCLUSIONS

An analysis of the level of job satisfaction as reported by the employees in the sample, provides evidence that on an overall basis the

EXHIBIT 18

COMPARISON BY INDUSTRY OF TOTAL JOB SATISFACTION SCORE



Kates, Peat, Marwick & Co.

employees of foreign-controlled firms appear to be equally satisfied with their jobs in comparison with employees of Canadian-controlled firms. Both sets of employees show similar patterns with respect to satisfaction with various aspects of their jobs.

The similarity in job satisfaction would appear to be logical given the similarity in business operation between the foreign-controlled and Canadian-controlled firms in the sample. However, the results show that foreign-controlled companies' employees claim they do not prefer to work for a Canadian-controlled company, and would seem to indicate that a pro-Canadian- or pro-foreign-controlled company attitude is developed through continued employment with a particular company.

V - ATTITUDES TOWARD CORPORATE BEHAVIOUR

One of the purposes of the employee attitude survey was to obtain the employees' perception of the differences in corporate behaviour between foreign- and Canadian-controlled companies. Since the purpose of the industry sub-studies was to identify actual corporate behavioural differences, the employee survey results would also complement the research undertaken in these industry sub-studies.

Of particular interest was to obtain a reading of what aspects of corporate behaviour employees felt to be more typical of Canadian-controlled as opposed to foreign-controlled companies. It was felt that if there were differences in attitudes between the two sets of employees, the differences would be most apparent where specific corporate behaviour was attributed to the foreign or Canadian ownership of companies.

QUESTION DESIGN

For the purpose of obtaining employees' perceptions re corporate behaviour, a number of statements were made to elicit a "disagree" or "agree" reaction from respondents. Some 16 statements were made in Section C of the questionnaire, and respondents were requested to record their reaction on a six-point scale.

The statements addressed themselves to specific aspects and characteristics of the industry under investigation. Each statement

was related to the behaviour of foreign- or Canadian-controlled companies or related aspects like possible government intervention, and protection of Canadian-controlled companies. The statements made were intended to be as neutral as possible, with particular attention given to attributing equal amounts of negative and positive behaviour to both foreign-controlled and Canadian-controlled companies.

Each statement referred to the respondent's own industry. For all employees in the manufacturing and resource sector industries, the statements were the same, aside from specifying the respondent's industry. An additional three statements were added to Section C for the mining industry employees, and one for the pulp and paper industry employees.

In the service sector industries, industry specific statements were presented for the respondent's reaction. It was felt that in the advertising industry, the engineering consulting industry, and among the architects, a series of statements should be prepared specifically for these groups of respondents.

It is to be emphasized that the results measure the respondents' claimed perceptions of corporate behaviour, since very few of them had any basis for truly evaluating relative corporate behaviour. It appears that largely because of this, the number of "no replies" was relatively high - up to 20 per cent in some industries. Individual respondents indicated their uneasiness about being qualified to make a judgment about the corporate behaviour of foreign- vs. Canadian-controlled companies.

MANUFACTURING AND
RESOURCE INDUSTRIES

Since Section C was virtually the same for the four manufacturing and resource industries, we first present the results of employee attitudes in these two sectors. Exhibit 19, overleaf, ranks statements concerning aspects of corporate behaviour and potential government intervention. The statements are ranked in order from those with which employees agreed most strongly, down to those with which they disagreed most strongly. From this exhibit, we would make two summary observations as follows:

- Employees of foreign-controlled and Canadian-controlled companies have quite different perceptions of corporate behaviour.
- Many general statements about corporate behaviour appear to be relatively contentious because in many cases there was more disagreement than agreement expressed.

The respondents' replies are interesting first, for the distinction between what employees generally agree about corporate behaviour as opposed to what they disagree about it, and second, for the differences in perception between employees of foreign-controlled and Canadian-controlled companies.

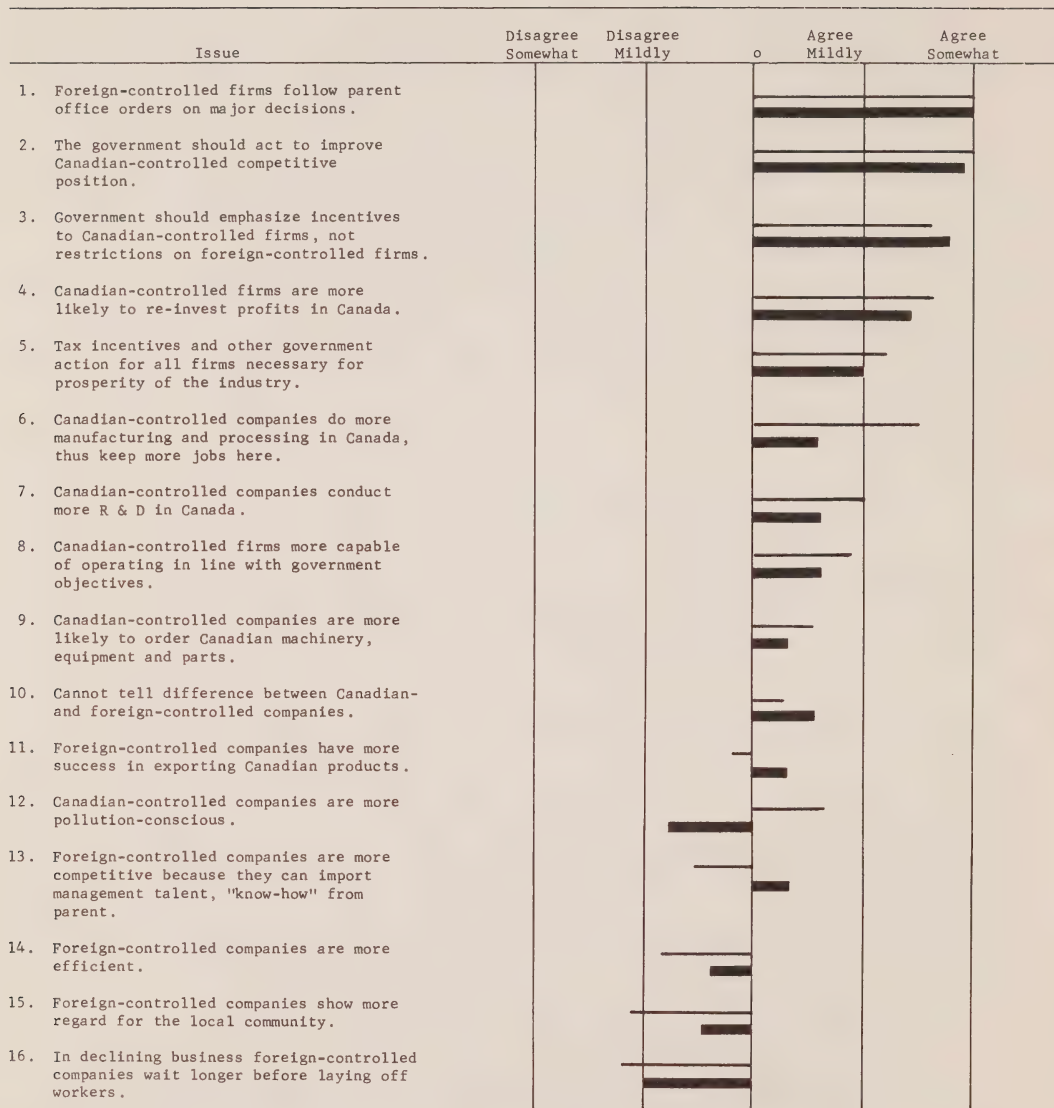
Agree/Disagree
Analysis

In an analysis of what statements seem to draw the highest

EXHIBIT 19

OPINIONS RELATED TO OWN INDUSTRY

ALL EMPLOYEES IN THE MANUFACTURING AND RESOURCE SECTORS



— Employees of Canadian-controlled companies.

— Employees of foreign-controlled companies.

expression of agreement from the employees, the following points are noted:

Government Intervention

- Support for government action to improve the competitive position of Canadian-controlled companies was high for both employees of foreign-controlled and Canadian-controlled companies.
- Support was also high for government action through incentives to Canadian-controlled companies rather than restrictions on foreign-controlled companies.

Canadian/Foreign Differences

- The statement that one cannot tell the difference between foreign- and Canadian-controlled companies appeared to be relatively contentious, with a little over half of both groups agreeing to some degree while over a third of both groups disagreed to some degree. This would seem to indicate that many employees feel that the two types of companies can be distinguished.

Canadian-Controlled Company Behaviour

- There was some agreement with several pro-Canadian behaviour statements, including "do more manufacturing and processing in Canada", "conduct more R & D in Canada", "operate more in line with government objectives", and "use Canadian machinery".

Foreign-Controlled Company Behaviour

- There was much general agreement with the notions that foreign-controlled companies are controlled from the outside, and that they are less likely to re-invest profits in Canada.
- There was mild disagreement about several pro-foreign-controlled behaviour, including, "show more regard for the local community", and "wait longer before laying off workers"; opinion was neutral about foreign-controlled firms "having more success in exporting Canadian products".

The gist of the statements appears to be that employees want government to act, and think that in many respects Canadian-controlled companies are better corporate citizens than their foreign-controlled counterparts. This summary of the employees' perceptions should not be construed as being conclusive, however, since it may indicate to some degree that employees are possibly following stereotypes or are indicating how they would like the situation to be. For whatever reason, it appears that, generally, employees feel there are differences between the corporate behaviour of foreign-controlled companies and Canadian-controlled companies.

Foreign/
Canadian Split

In assessing the significant differences between responses of employees of foreign-controlled and Canadian-controlled companies, the following appear to be significant:

- Employees of foreign-controlled companies appear to feel that there are fewer differences in corporate behaviour than employees of Canadian-controlled companies, since their responses are relatively less strong on the comparative aspects of corporate behaviour presented.
- The statements attributing positive behaviour to Canadian-controlled companies that drew the greatest polarization were that "they do more manufacturing and processing in Canada", and that "they are more pollution conscious".
- Some statements attributing positive foreign-controlled company behaviour also brought foreign/Canadian polarization, particularly when foreign-controlled companies were described as "having more success in exporting Canadian products", and "showing more regard for the local community".

- The statements indicating that foreign-controlled companies were more "efficient" and "competitive" also brought wide divergence in opinion between employees of foreign-controlled and Canadian-controlled companies.

From the replies by the two sets of employees, it appears that for some aspects of corporate behaviour there are wide divergences of opinion, while for some other aspects there is at least some measure of agreement between employees of foreign- and Canadian-controlled companies.

Individual Industry Analysis

A separate analysis for each industry in the manufacturing and resource sector has not been undertaken due to the relatively small sample sizes in each industry; however, the industries in which the largest divergence of views occurred were highlighted in Exhibit 19.

The auto parts industry provides the most disagreement between employees of foreign-controlled and Canadian-controlled companies for possible government intervention in a number of subjects. These include foreign parent control over its subsidiaries, re-investment of profits in Canada, and exports.

The pulp and paper and mining industry employees seem to have divergent opinions relative to agreement or disagreement on most aspects of corporate behaviour; they included behaviour related to processing, R & D, and purchasing in Canada, as well as community-oriented behaviour, such as keeping in line with government objectives, not laying off workers,

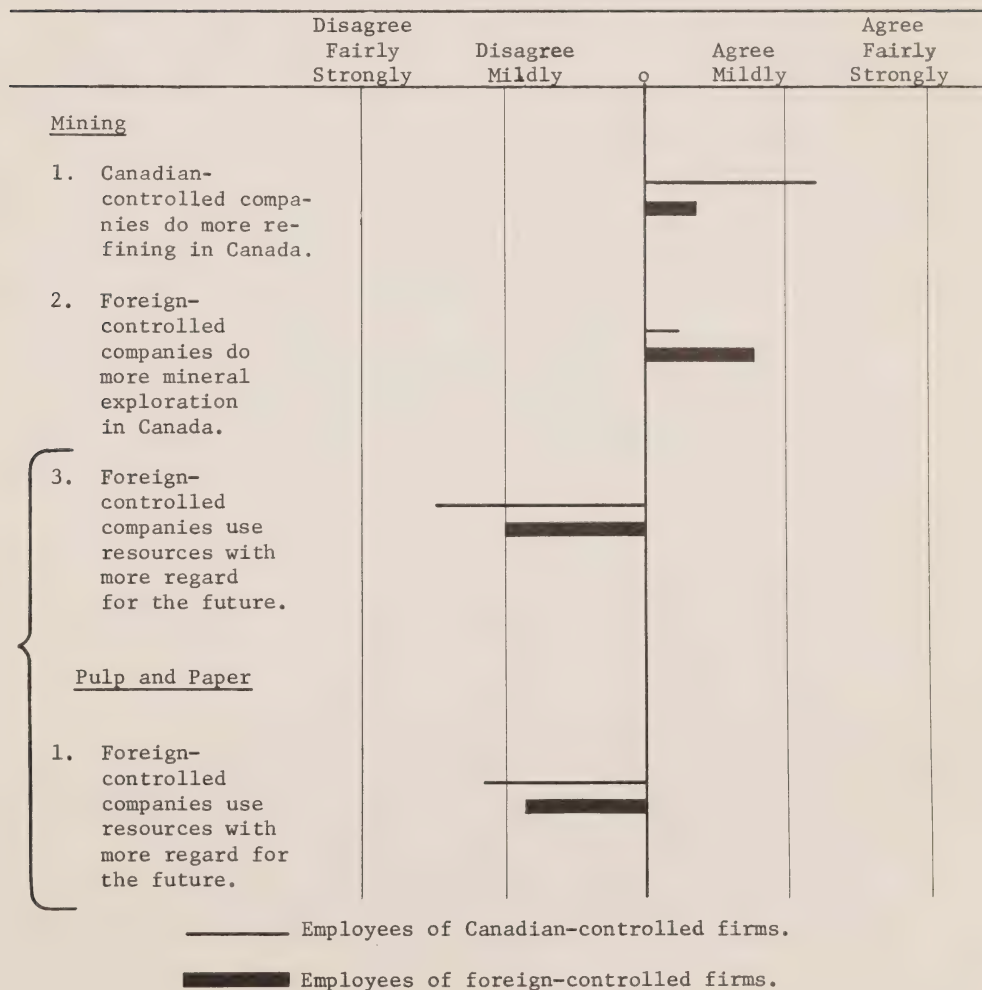
and showing more regard to the local community and pollution control. Employees of Canadian-controlled companies in the mining industry also feel more strongly than those in other industries about Canadian-controlled mining companies being as competitive as foreign-controlled mining companies.

Additional statements were added to Section C of the questionnaire that were relevant to the employees in the mining and pulp and paper industries. The results are shown in Exhibit 20, opposite, and the following observations can be made:

- In the resources sector employees feel that the behaviour of Canadian-controlled companies is more positive than that of foreign-controlled companies.

The strong negative reaction from employees in mining and pulp and paper to the statement that foreign-controlled companies "use resources with more regard for the future" is fairly significant in itself. Although the statement was designed to compare foreign- and Canadian-controlled company behaviour, the reply may indicate a general feeling that, somehow, foreign interests are taking advantage of our natural resources. Rather than reflecting particular disfavour on foreign-controlled resource companies, this response may be a general expression of uneasiness toward our allowing foreigners to develop and sell off natural resources to foreign customers.

The statement about foreign-controlled companies engaging in more mineral exploration showed a positive expression of agreement. However, this response may be regarded as "neutral" if one assumes that

EXHIBIT 20FOREIGN/CANADIAN COMPARISON OF RESOURCE INDUSTRIESATTITUDES TOWARDS RESOURCE UTILIZATION

greater mineral exploration is not necessarily a beneficial aspect of corporate behaviour. The other aspect of corporate behaviour in the resource sector - that Canadian-controlled companies do more refining in Canada - received a favourable response, and thus confirms the generally positive opinion about Canadian-controlled company behaviour.

SERVICE SECTOR

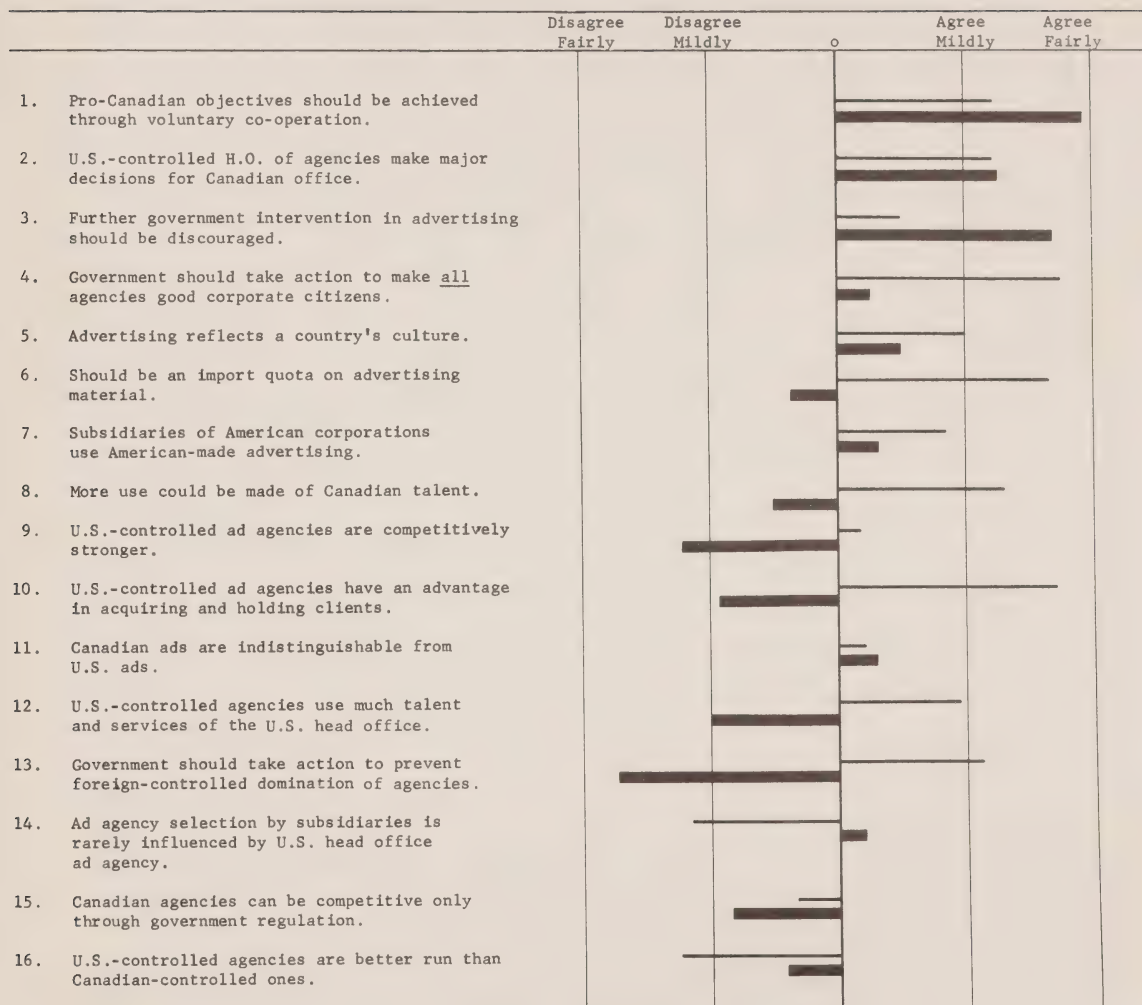
The statements in Section C of the questionnaires directed to advertising, architecture, and engineering consulting employees were more industry-specific than those drafted for the manufacturing and resource industries. Since they were more industry-specific, the statements were more precise as to behavioural patterns and potential government intervention in these service industries. The statements were also designed to present alleged behaviour, and to some extent did not contain the same neutrality of the C sections of the manufacturing and resource industries. However, considerable care has been taken to avoid drawing conclusions from any possibly biased response patterns that indicate an overly pro-Canadian-controlled firm sentiment.

Advertising Industry

The replies to the section are presented in bar chart format in Exhibit 21, opposite. Bearing in mind that the response of employees in foreign-controlled firms includes only one advertising agency (the other requested that we delete Section C from the questionnaire) the results indicate that:

EXHIBIT 21

ADVERTISING EMPLOYEES ATTITUDES TOWARD
CORPORATE BEHAVIOUR AND GOVERNMENT INITIATIVES



— Employees of Canadian-controlled firms.

■ Employees of foreign-controlled firms.

- There is a definite foreign/Canadian polarization for most of the issues; the only points of shared opinion are first, agreement that "U.S.-controlled head offices make major decisions for Canadian office", and second, fairly similar reception by both sets of employees that "Canadian ads are indistinguishable from U.S. ads".
- Employees of foreign-controlled agencies favour industry rather than government action, while Canadian-controlled agency personnel would also accept government intervention, including pro-Canadian-controlled agency actions.
- There is a wide divergence of opinion on whether the foreign-controlled agencies have specific competitive advantages over their Canadian-controlled counterparts; unlike the results in the manufacturing/resource industries, employees of Canadian-controlled firms feel strongly that they are at a competitive disadvantage vis-a-vis foreign-controlled firms.

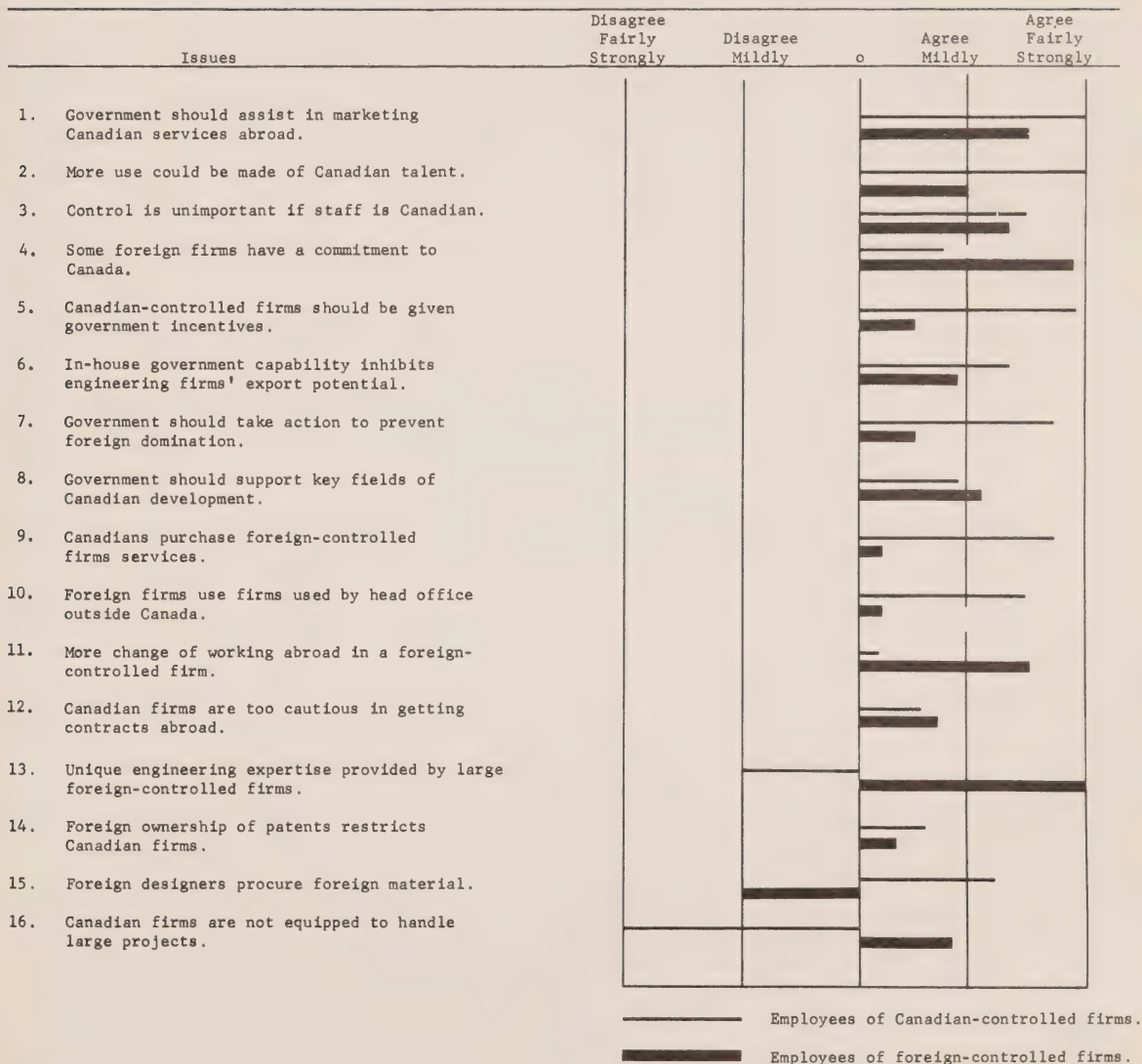
These results probably represent an industry which is relatively more polarized on the subject of economic nationalism. The advertising industry, at the time of the questionnaire administration, had been more active in public discussion of both sides of the question than the other industries.

Engineering Consulting

The engineering consulting replies are presented in Exhibit 22, opposite, and can be highlighted as follows:

- Although there was less total disagreement than in the advertising industry, a number of the issues presented were seen in black and white terms by the employees of Canadian- and foreign-controlled firms.
- Government intervention was widely accepted, although less enthusiastically by employees of foreign-controlled firms; they preferred aid for the whole industry rather discriminatory pro-Canadian action.

EXHIBIT 22

ENGINEERING CONSULTING EMPLOYEE ATTITUDES TOWARDS
CORPORATE BEHAVIOUR AND GOVERNMENT INITIATIVES

- The most striking divergence of opinion was in their respective beliefs about Canadian capability - foreign-controlled firm employees valued highly their "unique engineering skills", while Canadian-controlled firm employees felt they are "equipped to handle large projects".

These results are indicative of the current discussions in the industry with respect to the appropriate use of foreign-based and foreign-controlled engineering consulting services.

Architectural Firms

A series of statements was designed for architectural firms, although most of them were similar to the engineering consulting industry. Only one firm (Canadian-controlled) was eventually included in the survey. The replies of employees of that firm were similar to those of employees of Canadian-controlled engineering consulting firms, except that the degree of agreement in most cases was less strong than it was in the case of Canadian-controlled engineering consulting firm employees.

CONCLUSIONS

The statements attributing specific corporate behaviour to foreign- or Canadian-controlled firms, and those which proposed different government actions, revealed the general thrust of employee perceptions. The statements themselves were perhaps too simplistic to analyze individual results, since each statement raised issues that often were far too complex to summarize in one sentence.

What emerges from the replies are fairly explicit distinctions in the perception of corporate behaviour between foreign- and Canadian-controlled companies. It could be tentatively concluded that perceived differences in corporate behaviour are perhaps greater than actual differences. The response to these statements could be a form of wishful thinking, particularly by the employees of Canadian-controlled companies. On the other hand, the rather strong perceptions of foreign-controlled company respondents, polarized in the opposite direction on many issues, could also indicate a tendency for them to over-react. Since employees were asked to comment on issues for which most of them had no real basis of knowledge to make informed judgments, the extent of emotion in their reaction was probably increased on account of it.

An important result of the employees' responses is their strong support for government action relative to their support for statements about corporate behaviour issues. It appears that many employees would agree to some kind of government intervention to support indigenous Canadian industry, and that this action be preferably based on incentives rather than on restrictions on foreign-controlled companies.

VI - "WRITE-IN" OPINIONS

A blank page was included in the self-administered questionnaire to enable employees to write in their own comments. The purpose was to find out whether something that they feel was important was either completely left out of the questionnaire or not covered sufficiently.

The responses identified some issues omitted from the rest of the questionnaire and they added flavour generally to the attitudes obtained from the structured parts of the questionnaire.

OVERVIEW OF "WRITE-IN" RESPONSE

A total of 160 respondents, or 28.2 per cent of the total sample, made some written comments in response to the blank space provided; the response rate was 30.5 per cent for the sample employees of Canadian-controlled companies and 25.6 per cent for those of foreign-controlled companies.

Some comments of employees referred to their views on, or difficulties with the questionnaire itself (about five per cent). Many comments also pertained to personal job situations of the respondents (about 25 per cent), suggesting that they may have believed the purpose of the questionnaire was related to job satisfaction. However, most of the respondents (about three-quarters) commented on some aspect of foreign ownership or comparisons of Canadian-controlled and foreign-controlled company behaviour.

There were some general distinguishing aspects between the comments of employees of foreign-controlled and Canadian-controlled firms. Both touched on issues that were specific to their industry, or made statements asserting their pro-Canadian feelings. However, on the whole, there was a tendency for respondents employed by foreign-controlled firms to make a case for foreign investment and foreign-controlled companies, while employees of Canadian-controlled companies more frequently expressed pro-Canadian and pro-Canadian-controlled company attitudes.

MAIN THEMES EXPRESSED

There were several themes that seemed to be common across the industries, expressed by both employees of Canadian-controlled companies and employees of foreign-controlled companies.

Pro-Canadian Attitudes

By far the most numerous comments (about a third of the total) related to a pro-Canadianism, an anti-Americanism, or some combination of the two. The more negative statements were expressed like the following:

- "too much control by the United States - must be dramatically cut back"
- "I do not like the idea of becoming just another U.S. state".

Other comments revealed feelings that were neither anti-U.S. nor negatively directed towards foreign-controlled companies. They were

positive, pro-Canadian, and Canadian sentiments. A representative comment was as follows:

- "Foreign-controlled engineering firms, per se, are not a bad thing, as they provide competition for Canadian firms. However, local Canadian firms must be encouraged to develop and to expand."

Other respondents emphasized the need for investment as long as it does not mean foreign control. Sample statements were as follows:

- "Regardless of who invests money, as long as Canada maintains control, let the money come in and create jobs."
- "I am not interested whose money we use as long as Canadians control our own industry."

"Loser" Psychology

Some comments (about a dozen in all) we classify as indicative of a "loser" psychology which means that some respondents tended to deprecate Canadian efforts or believe we are relatively powerless vis-a-vis the United States. One way of expressing this was the notion that Canadians are not good enough to compete. For example, there were statements such as the following:

- "Canadians have a reluctance toward involvement in anything that is not a 'sure thing!'"
- "Canadian-based financing is not aggressive."

Other employees referred to our relative impotence in comments expressing the following sentiments:

- "When the government tries to do something for Canadian companies, the United States comes out on top of the heap every time."
- "It is difficult for Canada with a small production and a small population to compete with countries like the United States and Taiwan."

Foreign-Controlled vs.
Canadian-Controlled Companies

The emphasis in the replies was more toward general economic nationalism rather than reference to undesirable corporate behaviour by foreign-controlled companies. The unsolicited opinions in this section of the questionnaire seemed to convey the general impression that differences between foreign-controlled and Canadian-controlled companies, at least in the manufacturing and resource industries, were fairly difficult to detect. One respondent made only one comment, and this epitomized the response. It was as follows:

- "To me it is very hard to know what is a Canadian-controlled and a foreign-controlled company."

There was some comment expressing cynicism about the motives of any company, foreign-controlled or not. It appeared to some employees in the sample that companies were solely out to make money and neither seems better or worse than the other.

Pro- and Anti-
Government Involvement

Another general theme for a number of employees was whether government should act with respect to controlling the Canadian economy. There was perhaps a higher incidence of a pro- rather than an anti-

government intervention attitude.

However, there was significant comment, primarily from employees of foreign-controlled companies in the service sector, that no government action should be taken. People in the advertising business seemed wary of further government intervention because much of present government involvement in the industry was categorized as "heavy handed". Others were opposed to any government action, either on principle or because the government's track record did not lend confidence to its future success. On the other hand, a number of engineering consulting respondents encouraged government to promote the export of engineering services, improve the training and education of engineers in Canada, or generally to co-operate with business to improve the industry.

Other Issues

One subject that received scattered mention was that Canada should retain control over its natural resources (about seven or eight mentions). For example, two or three respondents maintained that Canada should process its resources before exporting them. Another claimed that through continental policies the Canadian Government was giving our resources away to the United States. Still another respondent related the issue to foreign ownership generally, stating that:

- "If we become too dependent on the United States, they will put a squeeze on us for our resources."

Unions receive some comment, although a number of respondents restricted their references to local or personal union/management problems. However, there were some explicit negative references to the foreign control of Canadian unions by four or five employees, expressed by such statements as:

- "American-controlled unions do not represent the true interest of our country."
- "Dues should not be passed on to the American head office of (the international union)."

There were no statements expressing positive aspects of international unions, nor were there negative comments about nationalist movements in Canadian unions.

INDUSTRY THEMES

Many of the comments were quite industry-specific, and there was considerable difference among the industries. In particular, the service industries and the electronics industry employees had many suggestions about how to improve their own industry.

In the advertising and engineering consulting industries, there were a number of fairly strong statements reflecting pro-Canadian-controlled company or pro-foreign-controlled company stands. The first were generally directed toward maintaining Canadian creative and technical capability, and the second toward showing how the foreign-controlled company contributed to the Canadian economy.

In the electronics industry there were a number of comments relating to what could be done to help the industry which was in a "precarious" state (according to one respondent). Some had ideas about improving Canadian technological and R & D capability, and others suggested specific government actions, including higher tariffs and better purchasing policies.

In the mining and pulp and paper industries, there was more of a tendency for respondents to comment on how powerless they were relative to the company for whom they worked. However, besides this apparent lack of concern for who controls a particular company, there was sentiment for Canadians to somehow retain control over the economy.

CONCLUSIONS

For most employees in the sample, the "write-in" comments seemed to reflect an immediate concern for their own job, security, company relations, and other personal matters.

The comments also appeared to convey the attitude, at least in the manufacturing and resource industries, that working for a Canadian-controlled vs. a foreign-controlled company was not the most important issue. There were a few cases where employees reflected by their comments that ownership does matter and does influence corporate behaviour, but, in general, emphasis on foreign/Canadian differences seemed somewhat "off base" for the respondents.

What does emerge, however, is a widespread, but still scattered, pro-Canadian sentiment. This was coloured in some cases by anti-American sentiment and the overall impression is that Canadians should control their own economy. Foreign ownership did not seem to be a "burning" issue for most respondents, but the general tone was one of concern for controlling our own affairs.

How this is done is another matter. Respondents would state that this was their desire, but would generally not advocate restricting the activities of foreign-controlled firms. Some respondents did make specific suggestions, but most were rather vague and just hoped it would be done by somebody.

VII - NATIONALIST SENTIMENT

In the employee attitudes survey, we attempted to determine the degree of nationalist sentiment, if any, among employees, and which groups of employees were more nationalistic than others, where relevant. To some extent the responses elicited by other parts of the questionnaire displayed indications of nationalist sentiment. However, this issue was focused on more directly by the questions in Section E.

QUESTION DESIGN

There were two questions which directly enquired about the nationalist sentiment of the respondent: first, he was asked to what degree he was currently nationalistic on a four-point scale, and second, whether he felt more of a Canadian or less of a Canadian now compared to four or five years ago. The positive answers for the two questions were combined into a composite "strong national" feeling while all other respondents (who did not indicate this positive feeling) became by definition the weak nationalist group.

A set of three questions was asked to obtain a more indirect reading of nationalism. These questions enquired whether:

- dependence on the U.S. is a good thing
- there is enough U.S. capital in Canada now
- a screening mechanism for future U.S. investments is a good idea.

Another question was tailored to the respondent's own employment situation rather than the more general nationalism issues. It asked whether he had a preference for working in a Canadian-controlled rather than a foreign-controlled company.

Finally, the employee's knowledge about company ownership was tested, both with respect to his own company and 14 other major Canadian companies. The question was designed to determine whether employees' nationalistic sentiment was based on an at least partial knowledge - that is whether major companies in Canada were recognized as foreign-owned or Canadian-owned.

DIRECT NATIONALIST SENTIMENT

The basic results of the nationalist sentiment questions are shown in Exhibit 23, opposite. This exhibit shows that:

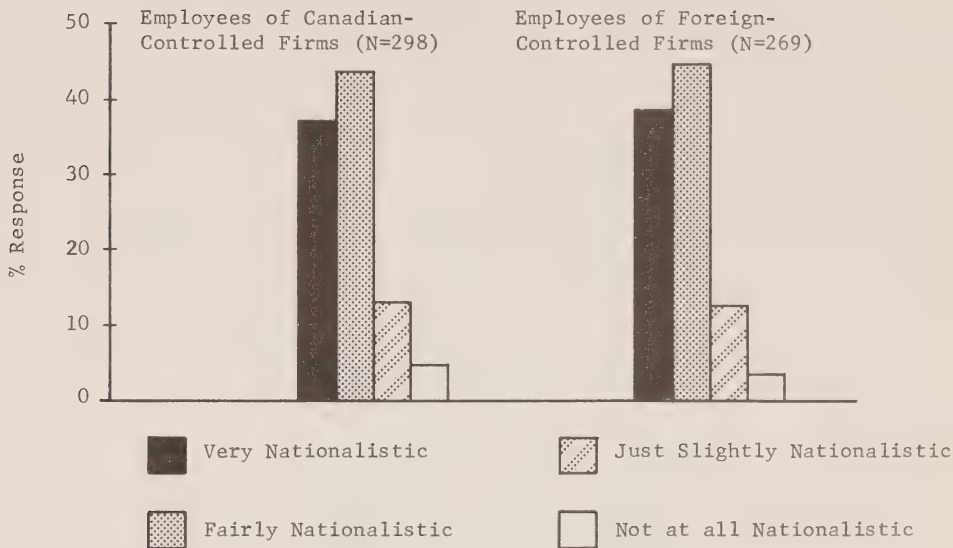
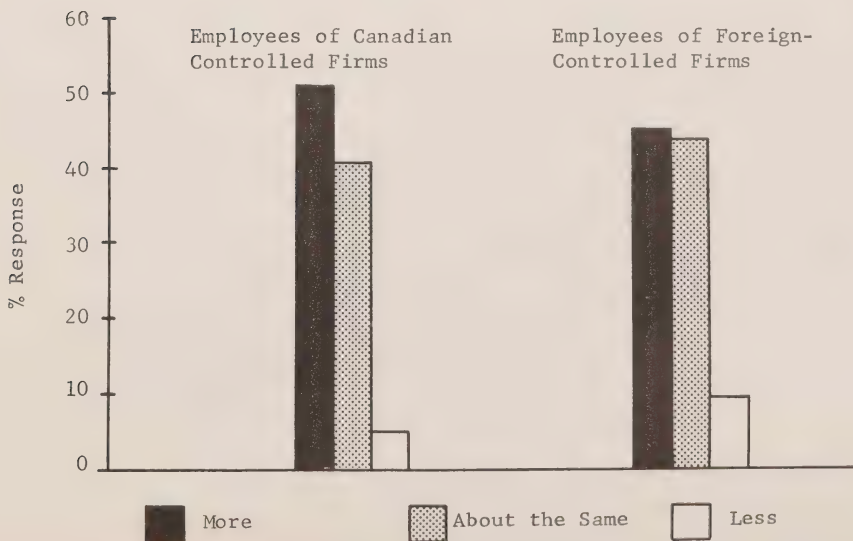
- There is a high degree of expressed nationalist sentiment, and employees feel they are more nationalistic now than they ~~were~~ five years ago.
- The degree of nationalism expressed was the same for both employees of foreign-controlled and Canadian-controlled companies; however, the latter showed a slightly higher "more nationalistic than five years ago" score; this result possibly indicates a marginally higher degree of nationalist feeling among employees of Canadian-controlled companies.

There are a number of possible explanations for the high degree of nationalism shown by employees of both sets of companies, among them the following:

EXHIBIT 23

NATIONALIST SENTIMENT

A: EMPLOYEES' FEELINGS ABOUT CANADA

B: EMPLOYEES' FEELINGS ABOUT BEING A CANADIAN
NOW COMPARED TO FIVE YEARS AGO

1. Working for a foreign-controlled firm may be considered a fact of life and does not interfere with one's nationalistic feelings. A respondent may reason there is nothing that he can do about the ownership of the company for which he works, but that nothing prevents him from being as nationalistic as the next fellow.
2. Employees of foreign-controlled firms may want to display their nationalist sentiment to a greater extent than it naturally exists, since they do work for foreign-controlled companies.
3. Foreign- and Canadian-controlled companies are much alike, and whether or not one works for a foreign-controlled firm has nothing to do with one's feeling for the country as a whole.
4. The need for a job may make such seemingly abstract considerations (such as ownership) secondary in importance.

From the responses to the other parts of the questionnaire it would appear that a combination of all but No.2 would be reasons for the relatively equal nationalist sentiment between the two sets of employees.

Nationalist
Sentiment by Sector

The degree of nationalist sentiment on a sector-by-sector basis is shown in Exhibit 24, opposite. This comparison reveals the following statistically significant differences between employees of foreign- and Canadian-controlled companies:

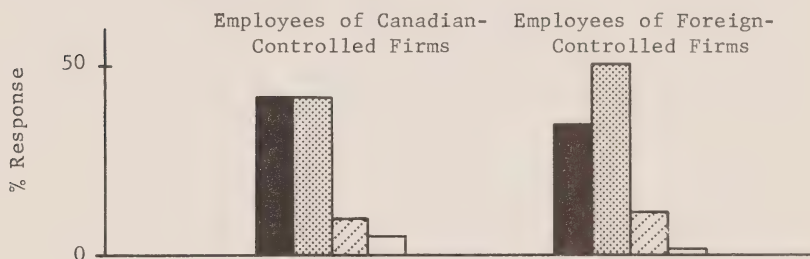
- Employees of foreign-controlled companies in the resource industries have a higher nationalist sentiment than employees of Canadian-controlled companies; the reverse is true for the manufacturing industries, and the sentiment is about equal in the service industries.

EXHIBIT 24COMPARISON OF FOREIGN/CANADIAN
NATIONALIST FEELING BY INDUSTRY

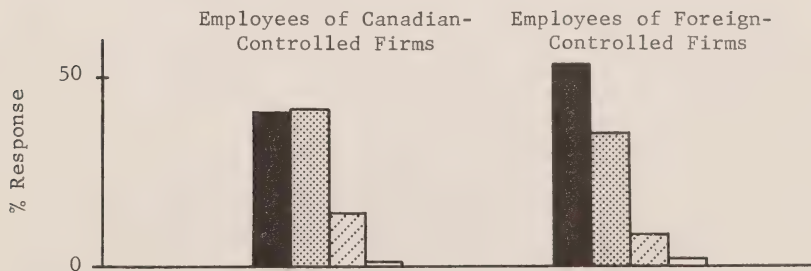
A: SERVICE SECTOR



B: MANUFACTURING SECTOR



C: RESOURCE SECTOR



Very Nationalistic
Fairly Nationalistic

Just Slightly Nationalistic
Not at all Nationalistic

- Employees of Canadian-controlled companies in the manufacturing and resource industries show a higher nationalist sentiment than employees of Canadian-controlled companies in the service industries.
- Employees of foreign-controlled companies in the resource industries have a higher nationalist sentiment than the employees of foreign-controlled companies in the service and manufacturing industries.

The results show that differences in nationalist sentiment vary somewhat among sectors and between employees of foreign-controlled and Canadian-controlled companies within sectors. Although these differences are statistically significant in themselves they should be analyzed in relation to other characteristics of those employees who have indicated a high degree of nationalist sentiment.

Nationalist Sentiment
By Income, Education,
Age and Occupation

A breakdown of the replies by income, education, age, and occupation does reveal a few differences that are worth noting. Exhibits 25, 26 and 27, pages 85, 86 and 87 respectively, relate "strong" vs. "weak" nationalism (the composite score) to these background characteristics of the sample employees. The statistically significant comparisons are:

- There is a marginally stronger nationalist sentiment shown by office workers and somewhat weaker sentiment among the owner/manager occupational category.
- There was little difference in nationalist sentiment in different age groups, but there is a correlation of age and nationalist sentiment changes over the last five years - the older the employee, the less his feelings changed.

EXHIBIT 25

EMPLOYEES INDICATING "STRONG" NATIONALIST SENTIMENT

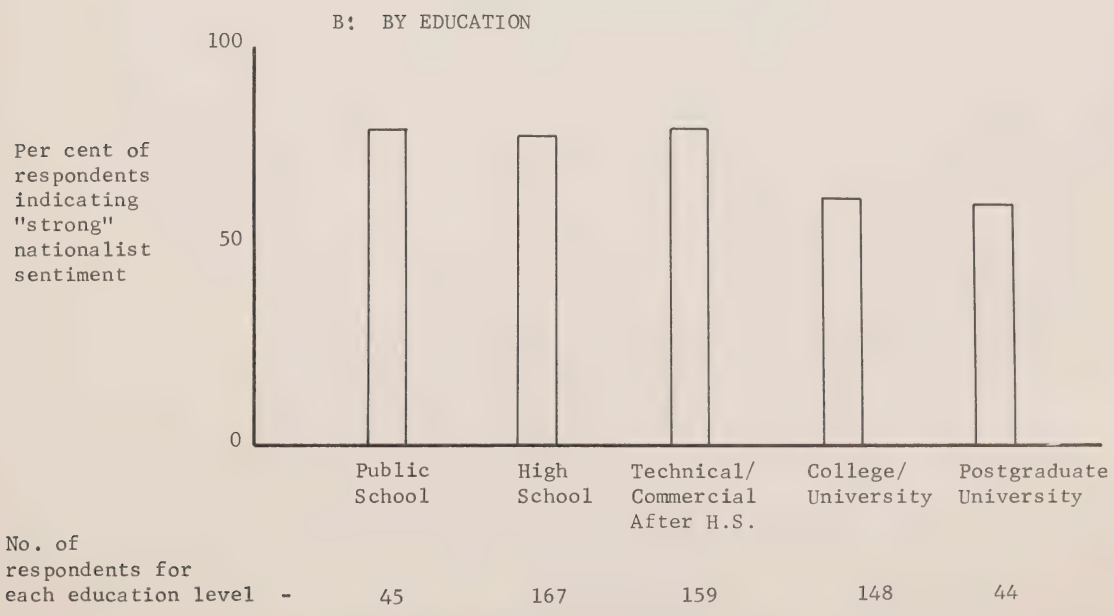
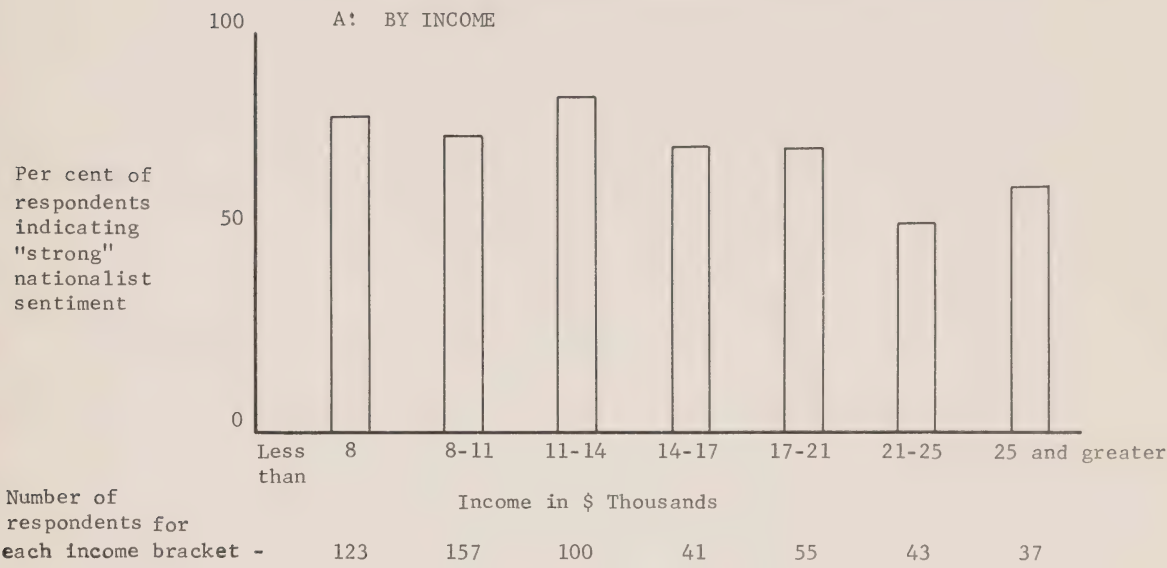
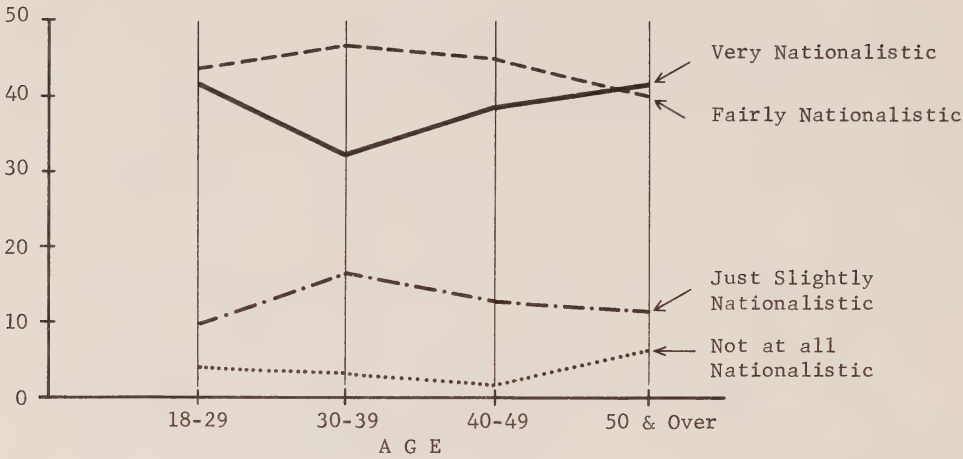


EXHIBIT 26

NATIONALIST SENTIMENT HELD BY DIFFERENT AGE GROUPS



FEELINGS OF DIFFERENT AGE GROUPS ABOUT
BEING CANADIAN COMPARED TO FIVE YEARS AGO

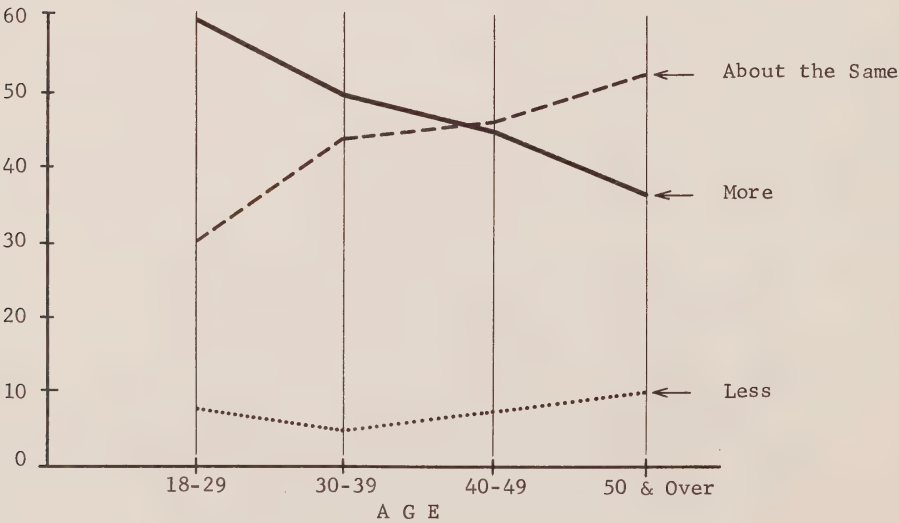
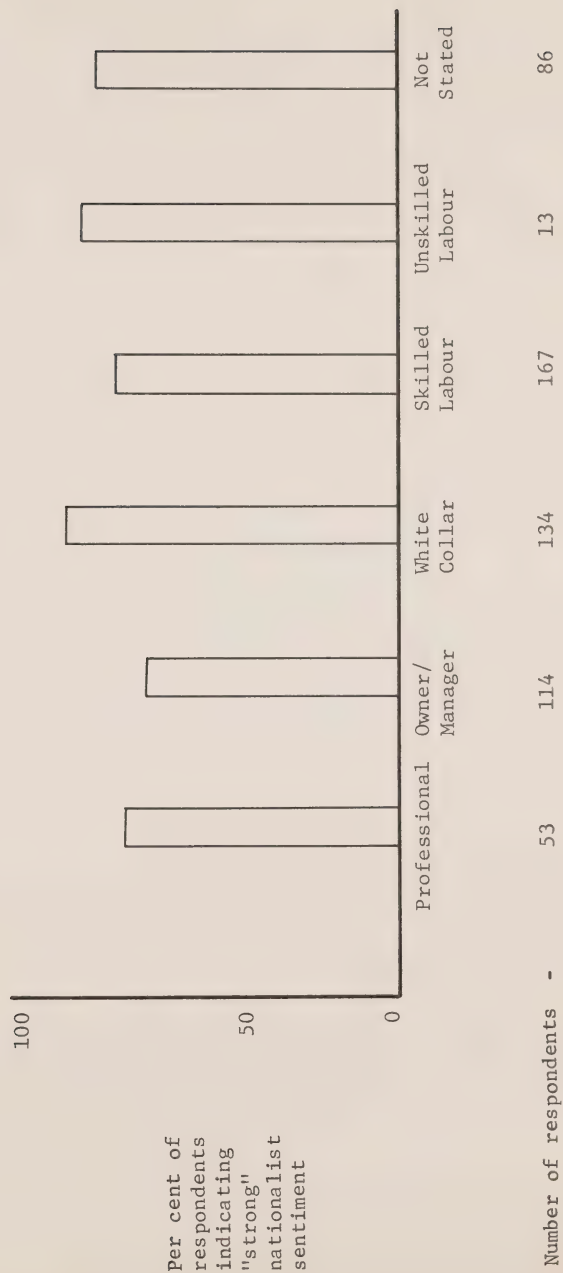


EXHIBIT 27

EMPLOYEES INDICATING "STRONG" NATIONALIST SENTIMENT

BY OCCUPATION



Kates, Peat, Marwick & Co.

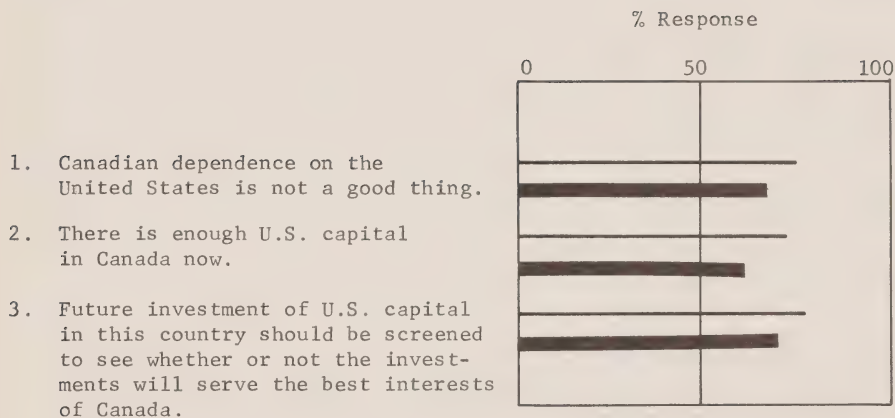
- Employees with higher education and income have a slight tendency to have a weaker nationalist sentiment than employees with less education and income.

The picture that emerges from these attempted correlations is that high income, high education employees, who are owner/manager in occupation are slightly less strongly self-stated nationalists than employees in other categories. It might be speculated that they have learned to live with foreign ownership and economic dependence, since by virtue of their success they have apparently not suffered because of it; or it might be assumed that employees in this category have simply not wanted to answer the question in the extreme, and replied "fairly nationalistic" instead of "very nationalistic" to the question.

INDIRECT INDICES OF NATIONALIST SENTIMENT

Employees were asked to respond to three separate questions which were designed as a consistency check on the attitudes shown by the nationalist sentiment questions. The breakdown of results between employees of foreign-controlled and Canadian-controlled firms is shown in Exhibit 28, opposite. The statistically significant highlights of this exhibit are as follows:

- There is a strong positive agreement that we have enough U.S. capital investment, that dependence on the U.S. is not a good thing and that a mechanism for screening U.S. investment is a good idea.
- Employees of Canadian-controlled companies offer a shade stronger positive response to these questions than do the employees of foreign-controlled companies.

EXHIBIT 28FOREIGN/CANADIAN COMPARISON OF OPINION
CONCERNING U.S. INVESTMENT IN CANADA

Employees of Canadian-controlled Firms

Employees of Foreign-controlled Firms

Kates, Peat, Marwick & Co.

From this consistency check with the nationalist sentiment questions (which showed a high degree of nationalist sentiment), it appears that employees do have a fair degree of nationalist feeling, particularly vis-a-vis the U.S. The slight but statistically significant difference in attitudes related to these three control questions between employees of foreign- and Canadian-controlled companies also supports the slight differences noted in the replies to the nationalist sentiment questions.

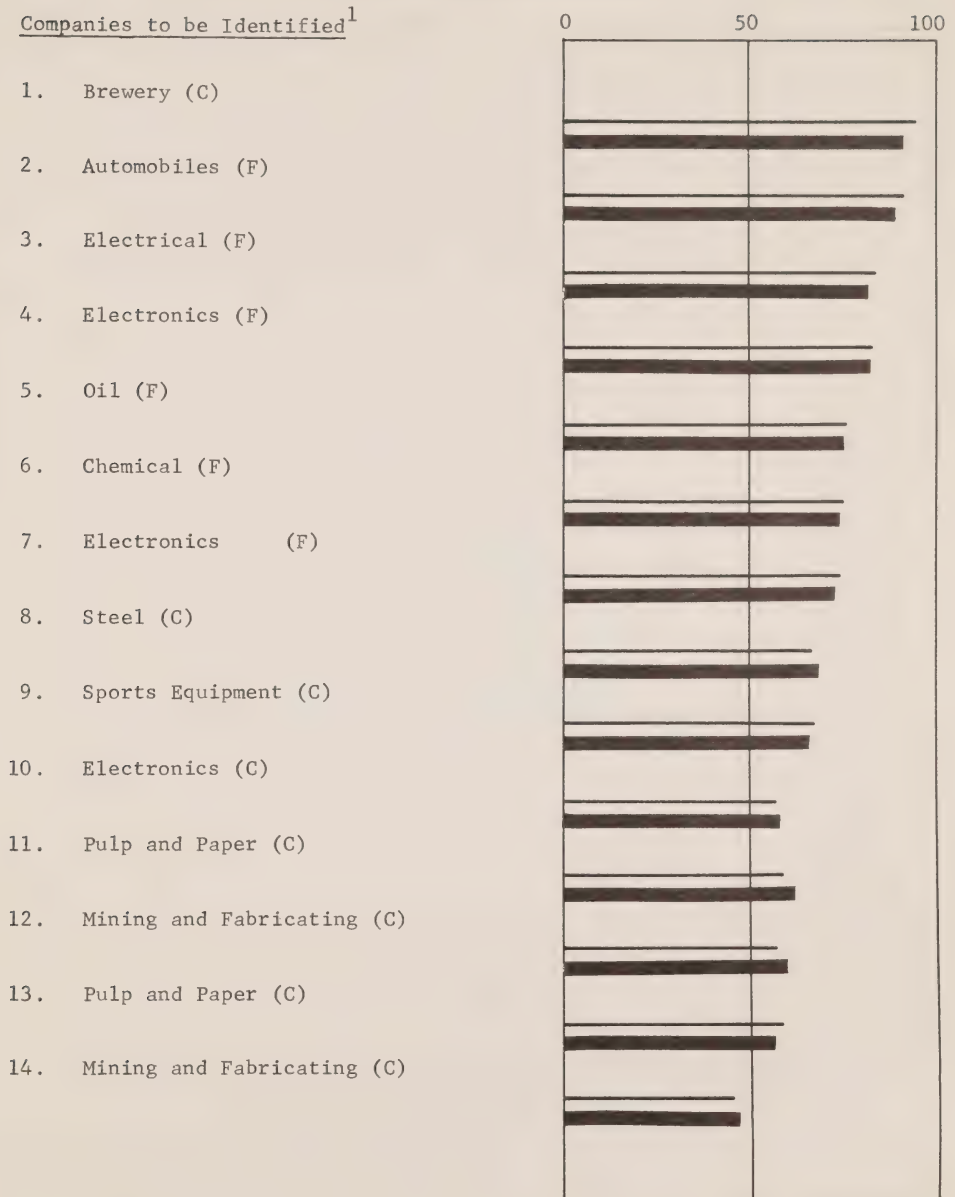
Knowledge Check

Respondents were asked whether they could identify the ownership of a group of 14 major Canadian companies. The question was also asked whether the respondent could identify the company for whom he was employed as Canadian- or foreign-owned.

Both these questions are in part a check on the knowledge of the respondent. Exhibit 29, opposite, shows the percentage of correct answers for each of the companies to be identified as to their ownership. These replies show that:

- There are no significant differences in company recognition between the employees of foreign-controlled companies and the employees of Canadian-controlled companies.

The sum total of correct replies varies considerably among specific companies mentioned. This result is not exceptional, since although all the companies listed are major ones in their industry some have a higher public visibility than others. In addition, one or two companies listed are cases in which the ownership has changed since World War II.

EXHIBIT 29AWARENESS OF OWNERSHIP OF MAJOR COMPANIES

Employees of Canadian-controlled Firms

Employees of Foreign-controlled Firms

Note: 1. The names of the companies used have been disguised for presentation purposes

The second question asked whether the respondent believed his company to be foreign- or Canadian-owned or partially both. The replies are shown on Exhibit 30, opposite, comparing employees of foreign-controlled and Canadian-controlled companies. The results reveal that:

- Employees of foreign-controlled companies are not as sure of the ownership/control situation of their companies as the employees of Canadian-controlled companies.

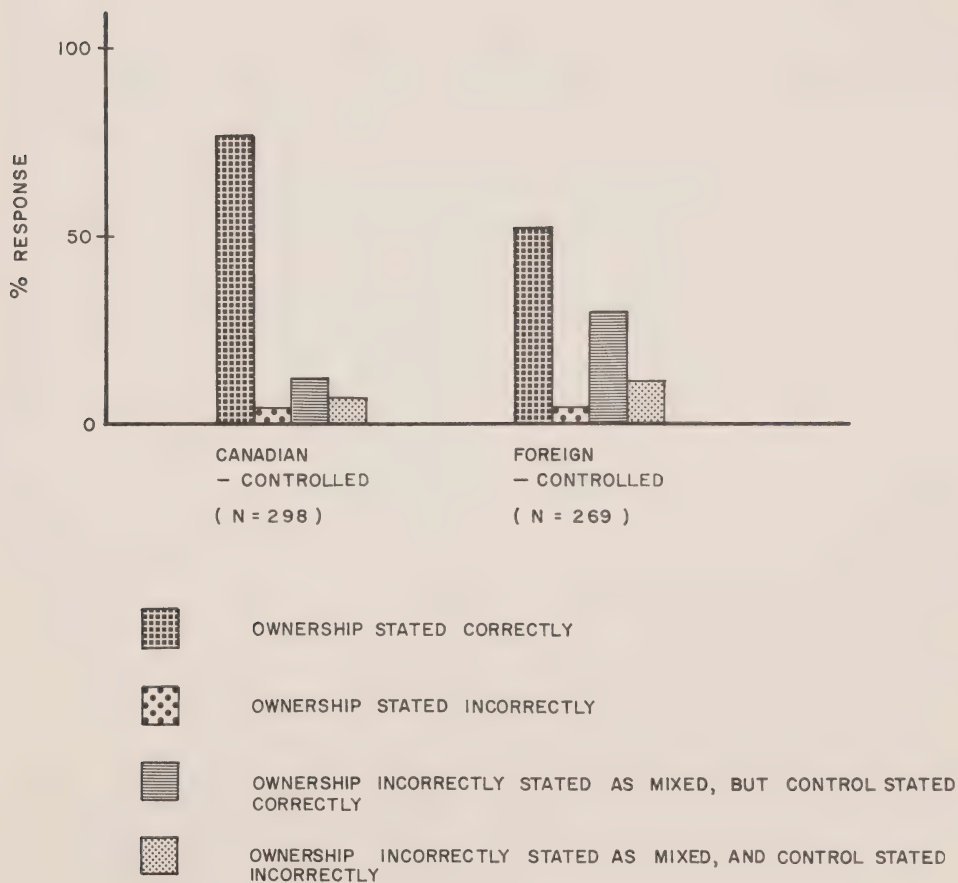
A more incorrect response was perhaps to have been expected from employees of foreign-controlled companies. If the company is located in Canada, why should it not be partly Canadian-owned or partly Canadian-controlled? In addition, particularly in the mining industry, what is actually the correct situation can be difficult to determine for some companies.

The interpretation of the results of this question could be that employees are not sure of the ownership and control situation with respect to their companies. Or, it could be that they do know, but some employees of foreign-controlled companies want to exhibit their feeling that their own companies have a definite Canadian orientation. It is perhaps a combination of both these factors: foreign-controlled companies seem to operate as if they were Canadian-controlled, and some employees wanted to emphasize the relative independence of the companies vis-a-vis their foreign head office. The second reason would appear to apply particularly to the advertising industry employees, while the first reason might apply more to the electronics, mining, and pulp and paper employees of foreign-controlled companies.

EXHIBIT 30

PERCEIVED OWNERSHIP OF RESPONDENT'S COMPANY

TOTAL RESPONDENTS



CONCLUSIONS

The attempt to identify the degree of nationalist sentiment among employees resulted in a general indication that employees regard themselves as fairly nationalistic. They also exhibit this broad reaction when asked questions that relate to the issue of nationalism.

The nationalist sentiment is fairly widespread among employees, although some groups of employees seem to have a somewhat higher nationalist sentiment "rating" than other groups. There is an observable but only slight, tendency for employees of foreign-controlled companies to be less nationalistic than employees of Canadian-controlled companies.

VIII - CONCLUSIONS

In this final section, we attempt to draw overall conclusions from the results of the survey of employee attitudes.

MAIN CONCLUSIONS

The survey provided some insights into employee attitudes that have a bearing on corporate behaviour and foreign ownership issues. The main conclusions could be described as follows:

- Employees of Canadian-controlled companies share much the same attitudes as employees of foreign-controlled corporations.
- Although there is some general agreement that Canadian-controlled companies are better "corporate citizens" than foreign-controlled companies, there is very little anti-foreign-controlled company sentiment.
- There is a widespread pro-Canada sentiment, and a general notion that the government should take steps to retain control over our economy.

Each of these general conclusions is explored below.

Employee Attitudes are Similar

The results of the survey leave the strong impression that employee attitudes of Canadian-controlled firms are not much different from those of foreign-controlled firms. The autonomy of the foreign-controlled company is perceived as restricted, but so is that of the branch office of the Canadian-controlled firm. The job satisfaction

scores are about equal. Both sets of employees feel that the Canadian-controlled company's behaviour is relatively better than that of the foreign-controlled company, and both favour government action in protecting national economic interests. Finally, both groups of employees show about equal "fairly nationalistic" ratings.

There are some differences in attitudes between employees of foreign-controlled and Canadian-controlled companies. The sharpest divergence of opinion occurs in the perceptions of corporate behaviour of both foreign- and Canadian-controlled firms. The employees of foreign-controlled companies do not appear as ready as employees of Canadian-controlled companies to consider that foreign-controlled corporate behaviour is "bad" or that Canadian-controlled corporate behaviour is "good".

The difference in opinion might stem from a tendency, or desire, of Canadians in general to believe that Canadian-controlled companies are better corporate citizens compared to foreign-controlled companies. However, employees of foreign-controlled firms have had more direct experience with foreign-controlled firms, and thus might be considered to have more "informed" views about foreign-controlled company behaviour than employees of Canadian-controlled companies. Since their experience with foreign-controlled firms has not been undesirable, employees of foreign-controlled companies may be less apt to believe the idea that Canadian-controlled companies are better corporate citizens than are foreign-controlled companies.

There may be other explanations for these differences in opinion between employees of Canadian-controlled and foreign-controlled companies in attitudes toward corporate behaviour; they are the only subject areas where there are significant differences in attitude between the two groups of employees.

Little Anti-Foreign-
Controlled Company Sentiment

When asked directly to compare foreign-controlled versus Canadian-controlled company behaviour, there was, as noted above, a tendency to favour Canadian-controlled firms. However, there was no overwhelming bias against foreign-controlled companies exhibited in the survey. Employees working for foreign-controlled companies were generally satisfied with their jobs, and did not feel that their companies were greatly controlled from the foreign head office. In addition, the "write-in" comments and the replies to the "prefer Canadian-controlled company" question both indicated that employees were not overly concerned about the behaviour of foreign-controlled companies when considering them relative to Canadian-controlled companies.

The results of the statements requesting "agreement" or "disagreement" to various aspects of corporate behaviour showed that employees of Canadian-controlled companies generally attributed positive behaviour to Canadian-controlled companies relative to that of foreign-controlled companies. While these opinions could be interpreted as indicating some anti-foreign-controlled company feeling, it is felt that

they could also be construed simply as a positive expression toward Canadian-controlled firms.

The survey also showed that employees of foreign-controlled firms believe (although less strongly than do employees of Canadian-controlled companies) that **foreign**-controlled companies behave less well than Canadian-controlled companies. These opinions could be interpreted as indicating that although employees of foreign-controlled companies are happy in their jobs and consider themselves as nationalistic as employees of Canadian-controlled companies, they feel that the foreign-controlled companies are not always acting for the greatest benefit to Canada. While employees are not against foreign-controlled companies or employers, they are perhaps less satisfied with them as good corporate citizens of Canada.

The "write-in" comments provide additional insight into this question. From the comments received, there were few clear views on whether foreign-controlled company corporate behaviour was desirable or not - the issue was seldom dealt with explicitly. When it was mentioned, the typical opinion was that all companies are alike since they all have similar economic objectives, and only occasionally did employees perceive some differences in corporate behaviour. Employees did not seem to place any particular blame on the behaviour of foreign-controlled companies, and seemed more affected, when they voluntarily "wrote in" their comments by general issues relating to foreign ownership and

economic independence.

The noticeably smaller proportion of employees of foreign-controlled firms who agree with their counterparts in Canadian-controlled companies in preferring Canadian-controlled firms would appear to illustrate a lack of substantial anti-foreign-controlled company sentiment by these employees. The interpretation of these results could be that employees like the company they work for, whether it be foreign- or Canadian-controlled.

Pro-Canadian Sentiment

Another general conclusion about the survey results is that there appears to have been a general nationalist sentiment among all employees. There is substantial feeling that more government action is needed to maintain the competitive position of Canadian-controlled firms and similarly that government should use incentives to foster the development of Canadian-controlled firms. Most employees state that they are nationalists, and most feel that we should do something about our dependence on the U.S. In the "write-in" opinions section, the pro-Canadian sentiments appeared in many ways, ranging from protecting our natural resources to Canadianizing our unions.

These results could be interpreted as showing that employees perceive that the effects of foreign ownership are far-reaching. However, there are probably many other factors influencing employees' basic pro-Canadian sentiment. These factors could include the educational and

historical influences, as well as the influence of the strong U.S. cultural overflow into the country. Therefore, while there is a pro-Canadian sentiment expressed, it would probably not be appropriate to single out foreign ownership as the prime cause of this sentiment.

Our conclusion is that since the pro-Canadian sentiment is expressed throughout the survey, it must be an underlying theme in the attitudes of the employees surveyed. Foreign ownership or the behaviour of foreign-controlled firms may not be the only cause of this sentiment, but employees are generally pro-Canadian and and, partly as a consequence, want government to help retain control over our economy and society.

APPENDIX A

EMPLOYEE SURVEY QUESTIONNAIRE AND COVERING LETTER



LEGISLATIVE ASSEMBLY

SELECT COMMITTEE ON ECONOMIC AND CULTURAL NATIONALISM

Chairman: RUSSELL D. ROWE, M.P.P.

Main Parliament Building
Queen's Park, Toronto

Clerk: JOHN A. HOLTBY

February 20, 1973

As you may be aware, the Ontario Legislature's Select Committee on Economic and Cultural Nationalism has for some time been examining various aspects of the Ontario economy as it relates to the economic and cultural development of the province. In order to gain the greatest possible understanding of the factors involved, six of Ontario's industry sectors have been selected for in-depth study. One of these industries is the advertising industry.

One part of this study involves the preparation of a document specifically concerned with understanding perceptions and attitudes of employees of advertising agencies.

Canadian Facts Co. Limited in Toronto will undertake this survey of employee attitudes and perceptions in co-operation with the consulting company of Kates, Peat, Marwick & Co., who are conducting interviews with senior executives in your company.

Canadian Facts Co. Limited are well qualified to carry out this study and we would very much appreciate your contribution to this study, by completing the enclosed self-administered questionnaire. For your information, I am advised that senior executives in your agency have read and approved the confidential distribution of this questionnaire.

-2-

The questionnaire is designed to obtain your opinion about a number of items. We recognize, however, that you may have opinions about related questions which we have not asked or you may wish to explain why you feel the way you do about some of the questions. Please use Section 'D' of the questionnaire to enlarge on your response if you wish.

Finally, Canadian Facts will keep the names of those interviewed entirely confidential. Not everyone in the industry will be asked to complete this questionnaire, but we are confident that your co-operation will help to ensure the essential representative quality of this study.

Should you have any questions about this study or Canadian Facts, please feel free to call either Ms. Diane Flood or Mr. J.A. Gonder of Canadian Facts at 416-924-5751. When you have completed the questionnaire please return it to the offices of Canadian Facts, in the stamped, self-addressed envelope provided.

Thanking you for your co-operation, I am

Yours sincerely,

A handwritten signature in cursive script that reads "Russell D. Rowe". The signature is written in dark ink and is positioned above the printed name and title.

Russell D. Rowe, M.P.P.
Chairman

SECTION A

ADVERTISING, ARCHITECTURE
AND ENGINEERING CONSULTING

In working through this questionnaire you will find directions on how to complete each question. These directions are designed so that you can work through each of the questions without complication.

All of the questions provide alternative answers and you choose the answer that comes closest to how you feel.

The answers to some of the questions will require you to answer further questions on the same topic.

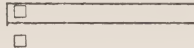
Example (a)



In such a case the answer box has a large box around it, as shown in example (a) above and the additional questions for you to answer are inside the box.

In other instances an answer box appears like that in example (b) shown below where directions appear inside the rectangle.

Example (b)



If you check an answer box like that in example (b), simply follow the instruction that appears in the rectangle.

The questions are concerned with finding out what your attitudes and opinions are on these specific issues. Consequently, there is no right or wrong answer to each of these questions -- there is only one answer and that is your answer.

If you are not always certain about your answer, do not worry and please do not ask any one else to help you answer. We are interested only in your attitudes and opinions about these matters and it is important that you answer them yourself.

Please read each question carefully and answer each of them to the best of your ability.

THANK YOU FOR HELPING US.

SECTION A

7-1

10-2

The following questions are about the relationships and lines of communication between your office and any other office your company might have.

1-a) Does your company have one or more than one office in Canada?

ONE OFFICE ☐ GO TO Q. 5-a)

11-1

MORE THAN ONE OFFICE ☐ COMPLETE -b)

2

-b) Is the office you work in a branch office or is it the head office in Canada?

HEAD OFFICE ☐ GO TO Q. 5-a)

12-Y

BRANCH OFFICE ☐

2. Which of these statements best describes your office's association with your head office in Canada?

We are completely independent of this office
with very little ongoing contact ☐

0

We are independent but have an ongoing liaison
with this office ☐

1

We are independent in day to day matters but
fall under the overall supervision of this
office ☐

2

We have little independence and must report
to this office even for day to day matters ☐

3

3-a) To your knowledge, do any people in your office require approval at any time from one or more people at your head office in Canada?

NO ☐

13-1

YES ☐

2

-b) Would you say such approval is required

All of the time ☐

14-Y

In many instances ☐

X

Only occasionally ☐

0

4. When approval is sought, what type of decisions are usually involved?

CHECK ANY NUMBER:

Major corporate policy decisions ☐

2

Personnel decisions ☐

3

Production questions ☐

4

Client policy decisions ☐

5

Major financial expenditure decisions ☐

6

Other (SPECIFY) ☐

15-

5-a) Does your company have an office or offices outside of Canada?

NO ☐ GO TO SECTION B

16-Y

YES ☐

X

-b) Which of these statements best describes your office's association with any office outside Canada?

We actively control one or more offices outside
Canada ☐

0

We are completely independent of any office out-
side Canada, with very little ongoing contact ☐

1

We are independent but have an ongoing liaison with
this office ☐

2

We are independent in day to day matters but fall
under the overall supervision of this office ☐

3

We have little independence and must report to
this office even for day to day matters ☐

4

IF YOU HAVE OFFICE(S) OUTSIDE CANADA:

6-a) To your knowledge, do any people in your office require approval at any time from one or more people at your office(s) outside Canada?

NO

☐ GO TO SECTION B

17-1

YES

☐

2

-b) Would you say approval is required

All of the time ☐

18-Y

In many instances ☐

X

Only occasionally ☐

0

7. When approval is sought, what type of decisions are usually involved?
CHECK ANY NUMBER:Major corporate policy decisions ☐

2

Personnel decisions ☐

3

Production questions ☐

4

Client policy decisions ☐

5

Major financial expenditure decisions .. ☐

6

Other (SPECIFY)

19-

20/31

SECTION A

AUTO PARTS, ELECTRONICS
PULP AND PAPER, MINING

CANADIAN FACTS CO., LIMITED
TORONTO - MONTREAL

10-3 10-4 10-5 10-6

SECTION A

1. Is your place of work an office or manufacturing plant/mine?

OFFICE ☐ GO TO Q. 7

PLANT/MINE ☐

2. Is this plant/mine the only one in Canada or are there others?

ONLY PLANT/MINE IN CANADA ☐

OTHER PLANTS/MINES IN CANADA ☐

3. Which of the following offices does your plant/mine report to?

Canadian head office ☐

Canadian branch office ☐

Office outside Canada ☐

4. Which of these statements best describes your plants/mines association with this office?

We are completely independent of this office with very little ongoing contact ☐

We are independent but have an ongoing liason with this office ☐

We are independent in day to day matters but fall under the overall supervision of this office ☐

We have little independence and must report to this office even for day to day matters ☐

5. To your knowledge, do any people in your plant/mine require approval at any time from this office?

NO ☐

YES ☐

- 6-a) Would you say that approval is required

All of the time ☐

In many instances ☐

Only occasionally ☐

- b) When approval is sought what type of decision is usually involved?

Major production line decisions ☐

Major technical decisions ☐

Major labour dispute decisions ☐

Hiring of plant personnel ☐

FOR OFFICE WORKERS ONLY

7. Does your company have one or more than one office in Canada?

ONE OFFICE ☐

MORE THAN ONE OFFICE ☐

- 2 -

8. Is the office you work in a branch office or is it the head office in Canada?

HEAD OFFICE ☐ GO TO Q. 12

BRANCH OFFICE ☐

9. Which of these statements best describes your office's association with your head office in Canada?

We are completely independent of this office with very little ongoing contact ☐

We are independent but have an ongoing liaison with this office ☐

We are independent in day to day matters but fall under the overall supervision of this office ☐

We have little independence and must report to this office even for day to day matters ☐

10-a) To your knowledge, do any people in your office require approval at any time from one or more people at your head office in Canada?

NO ☐

YES ☐

-b) Would you say such approval is required

All of the time ☐

In many instances ☐

Only occasionally ☐

11. When approval is sought, what type of decisions are usually involved?
CHECK ANY NUMBER:

Major corporate policy decisions ☐

Personnel decisions ☐

Production questions ☐

Client policy decisions ☐

Major financial expenditure decisions .. ☐

Other (SPECIFY) ☐

12-a) Does your company have an office or offices outside of Canada?

NO ☐ GO TO NEXT SECTION

YES ☐

-b) Which of these statements best describes your office's association with any office outside Canada?

We actively control one or more offices outside Canada ☐

We are completely independent of any office outside Canada, with very little ongoing contact ☐

We are independent but have an ongoing liaison with this office(s) outside Canada ☐

We are independent in day to day matters but fall under the overall supervision of this office(s) outside Canada .. ☐

We have little independence and must report to this office(s) outside Canada even for day to day matters ☐

- 3 -

13-a) To your knowledge, do any people in your office require approval at any time from one or more people at your office(s) outside Canada?

NO ☐ GO TO NEXT SECTION

YES ☐

-b) Would you say approval is required

All of the time ☐

In many instances ☐

Only occasionally ☐

14. When approval is sought, what type of decisions are usually involved?
CHECK ANY NUMBER:

Major corporate policy decisions ☐

Personnel decisions ☐

Production questions ☐

Client policy decisions ☐

Major financial expenditure decisions ☐

Other (SPECIFY) _____

SECTION B

(COMMON TO ALL SIX INDUSTRIES)

SECTION B

The following few questions are intended to assess how you feel about your current job. (FOR Q. 1 TO 9 CHECK ONE BOX ONLY) If you really feel that you cannot choose one of the alternatives for any question please write N.O. to indicate No Opinion.

- | | | | | |
|------|---|--|------|---|
| 1. | How satisfied are you that providing you continue to perform satisfactorily in your work you can look forward to continued employment with your present employer as long as you wish? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 32-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 2. | How satisfied are you with the degree of respect you receive from others in your Company because of your job and your work? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 33-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 3. | How satisfied are you with the degree of respect you receive from people in your community because of your job or work in present company? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 34-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 4. | How satisfied are you with the chances that your company will provide you with the training or preparation you need now or might need in the near future? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 35-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 5. | How satisfied are you with the explanation you get for company changes and decisions which effect you? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 36-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 6. | Were you to lose you present job through disability, obsolescence or automation, how satisfied are you with the retraining or job transfer opportunities offered by your company? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 37-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| 7-a) | How satisfied are you that your day to day job as presently defined provides you with sufficient influence and control over what you do and how you do it? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 38-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |
| -b) | How do you feel about the degree that you are involved in decisions which affect your work? | | | |
| | very satisfied <input type="checkbox"/> | slightly dissatisfied ... <input type="checkbox"/> | 39-1 | 4 |
| | fairly satisfied <input type="checkbox"/> | fairly dissatisfied <input type="checkbox"/> | 2 | 5 |
| | slightly satisfied <input type="checkbox"/> | very dissatisfied <input type="checkbox"/> | 3 | 6 |

How do you feel about the degree that you participate in setting your own goals or objectives for work?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	40-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

How do you feel about your chances to grow and progress within your company?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	41-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

Some jobs provide a great deal of opportunity to learn more about the work and enable a person to increase his knowledge and capability; other jobs provide very few such opportunities to learn and grow. How do you feel about your present job?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	42-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

Compared with what you want in a job, how satisfied are you with the extent to which your job provides challenging work to do -- work from which you can get a personal sense of accomplishment?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	43-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

How satisfied are you with your earnings considering what you could get for the same kind of work at other companies?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	44-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

Compared with what you want in a job how satisfied are you with the extent to which your job leaves you sufficient time for your personal or family life?

very satisfied	<input type="checkbox"/>	slightly dissatisfied ...	<input type="checkbox"/>	45-1	4
fairly satisfied	<input type="checkbox"/>	fairly dissatisfied	<input type="checkbox"/>	2	5
slightly satisfied	<input type="checkbox"/>	very dissatisfied	<input type="checkbox"/>	3	6

How important is it to you personally to spend your career working for your present company rather than with some other organization?

very important	<input type="checkbox"/>	of some importance	<input type="checkbox"/>	46-1	4
quite important	<input type="checkbox"/>	of little important	<input type="checkbox"/>	2	5
fairly important	<input type="checkbox"/>	of no importance at all	<input type="checkbox"/>	3	6

Of the following dissatisfactions please check the three which would be most likely to cause you to leave your present company?

boredom with current type of work	<input type="checkbox"/>	47-Y
don't like the people I work with	<input type="checkbox"/>	X
inadequate earnings	<input type="checkbox"/>	0
dissatisfaction with agency management and company politics	<input type="checkbox"/>	1
no opportunity for promotion	<input type="checkbox"/>	2
unable to work well with immediate manager	<input type="checkbox"/>	3
inadequate responsibilities	<input type="checkbox"/>	4
difficulty of communication with top management.....	<input type="checkbox"/>	5

SECTION C

ADVERTISING

SECTION C

1

FOR
OFFICE
USE
ONLY

The following is a list of statements on various matters related to the advertising industry. We want to get your opinions for each of these statements....but if you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

- | | | | |
|----|---|--|--------|
| 1. | More use could be made of Canadian talent and suppliers in the production of advertisements | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 48-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 2. | Most advertisers who are subsidiaries of American corporations tend to use the same advertisements they make for the American market. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 49-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 3. | There should be some form of quota or regulation on the import to Canada of advertising material produced outside the country. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 50-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 4. | American owned advertising agencies generally have an advantage in acquiring and holding clients that their parent agencies in the U.S. have as clients. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 51-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 5. | In their selection of advertising agencies American subsidiaries in Canada are rarely influenced by the fact that their head office in the U.S. is being served by the same agency. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 52-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 6. | The U.S. controlled agencies make a great deal of use out of the talent and services in their American head offices. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 53-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 7. | The head offices of American controlled agencies seem to make many of the major decisions concerning their Canadian operations. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 54-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |
| 8. | American controlled agencies appear to be in a stronger competitive position than Canadian agencies in Canada. | | |
| | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 55-1 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 6 |

9. American controlled agencies appear to be better run than Canadian controlled agencies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 56-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
10. Canadian owned advertising agencies can only ward off increasing competition from American controlled agencies in the long run through government assistance or regulation.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 57-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
11. Most Canadian advertisements or commercials are virtually indistinguishable from American advertisements.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 58-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
12. Most advertising reflects as much about a country's culture as films, television programs, sports and the arts.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 59-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
13. The government should take whatever action is necessary to prevent foreign controlled agencies from dominating the industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 60-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
14. The government should emphasize measures designed to make agencies "good corporate citizens" whatever their ownership.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 61-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
15. The government should rely mainly on voluntary co-operation of advertising agencies through the advertising associations to achieve "pro-Canadian" objectives.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 62-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
16. The government already exerts a substantial amount of regulation over advertising and any further interventions should be discouraged.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 63-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |

SECTION C

ENGINEERING CONSULTING

SECTION C

10-2

FOR
OFFICE
USE
ONLY

The following is a list of statements on various matters related to engineering consultants. We want to get your opinions for each of these statements....but If you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

1. More use could be made of Canadian engineering talent, rather than bringing in as many foreign engineers as Canada does now.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	48-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

2. It does not matter whether consulting engineering firms operating in Canada are Canadian or foreign-controlled provided that their staff is virtually all Canadian.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	49-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

3. When design work is done by foreign-controlled engineering consulting firms, there is more of a tendency to procure materials and equipment from foreign sources.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	50-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

4. Many large foreign-controlled corporations in Canada tend to use the engineering consulting firms that their parent head office uses outside Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	51-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

5. Canadian-controlled firms are just not equipped to handle the largest engineering projects in Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	52-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

6. Canadian purchasers of engineering services often neglect or overlook competence that exists in Canada and hire foreign-controlled firms.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	53-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

7. Governments at all levels and companies operating in Canada should be given incentives to use Canadian-controlled engineering firms.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	54-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

8. Working in a large foreign-controlled engineering firm increases one's opportunities for working around the world relative to working for a Canadian-controlled engineering firm.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	55-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

SECTION C (Continued)

10-2

9. The ownership of engineering patents by foreign-controlled corporations restricts potential business for Canadian-controlled engineering firms in many areas.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 56-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
10. The development of in-house capability by government departments reduces the export potential of engineering consulting firms by inhibiting their size and development of engineering experience.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 57-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
11. Canadian-controlled engineering consulting firms are too cautious in their approach to getting contracts abroad.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 58-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
12. The government should do a great deal more to assist engineering consulting firms to market the use of Canadian engineers abroad.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 59-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
13. The government should take whatever action is necessary to prevent foreign-controlled engineering firms from achieving a dominating position in various engineering fields.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 60-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
14. The government should select key engineering fields and support any engineering consulting firm with a presence in Canada in these fields to develop strong Canadian capability.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 61-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
15. It is a good thing for Canada to have some large foreign-controlled engineering consulting firms operating here because they provide a unique source of engineering expertise.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 62-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
16. Some foreign-controlled engineering consulting firms seem to have a commitment to Canada, while others seem to come here only for individual projects.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 63-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |

SECTION C

ARCHITECTURE

SECTION C

10-7

Study S0581

FOR
OFFICE
USE
ONLY

The following is a list of statements on various matters related to Architects. We want to get your opinions for each of these statements...but if you definitely can't answer a particular question, just write N.O. to indicate opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY.)

1. More use could be made of Canadian architectural talent, rather than bringing in as many foreign architects as Canada now does.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	48-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
2. When design work is done by foreign-controlled architectural firms, there is more of a tendency to procure materials and equipment from foreign sources.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	49-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
3. Many large foreign-controlled corporations in Canada tend to use the architectural firms that their parent head office uses outside Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	50-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
4. Canadian-controlled firms are just not equipped to handle the largest architectural projects in Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	51-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
5. Canadian purchasers of architectural services often neglect or overlook competence that exists in Canada and hire foreign-controlled firms.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	52-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
6. Governments at all levels and companies operating in Canada should be given incentives to use Canadian-controlled architectural firms.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	53-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
7. Working in a large foreign-controlled architectural firm increases one's opportunities for working around the world relative to working for a Canadian-controlled architectural firm.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	54-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6
8. Canadian-controlled architectural firms are too cautious in their approach to getting contracts abroad.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	55-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

SECTION C

AUTO PARTS

SECTION C

10-3

The following is a list of statements on various matters related to the auto parts industry. We want to get your opinions for each of these statements....but if you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

1. In the auto parts industry Canadian-controlled companies tend to conduct more research and development in Canada than foreign-controlled companies do.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	48-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

2. Foreign-controlled companies are more efficient than Canadian-controlled companies in the auto parts industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	49-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

3. Canadian-controlled companies in the auto parts industry are more likely to order Canadian machinery, equipment and parts than are foreign-controlled firms.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	50-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

4. Foreign-controlled companies in the auto parts industry have more success in exporting Canadian products than Canadian-controlled companies do.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	51-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

5. Canadian-controlled firms in the auto parts industry are more capable of operating in line with government social and economic objectives than are the foreign-controlled companies.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	52-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

6. For major decisions, foreign-controlled companies in the auto parts industry must follow the orders of their "parent office" outside Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	53-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

7. The government should take action to improve the competitive position of Canadian-controlled firms in the auto parts industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	54-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

8. Whatever government action taken in the auto parts industry should emphasize incentives to Canadian-controlled companies rather than restrictions on the operations of foreign-controlled companies.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	55-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

SECTION C (Continued)

10-3

9. Foreign-controlled companies in the auto parts industry generally show more regard for the local community than do Canadian-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 56-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
10. In case of declining business in the auto parts industry, foreign-controlled companies will tend to wait longer than Canadian-owned companies before laying off workers.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 57-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
11. Canadian-controlled companies in the auto parts industry do more manufacturing and processing in Canada, and thus tend to keep more jobs in Canada than foreign-controlled companies do.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 58-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
12. You cannot really tell Canadian- and foreign-controlled companies apart in the auto parts industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 59-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
13. Foreign-controlled firms in the auto parts industry are more competitive than Canadian ones are because they can import "know-how" and management talent from their "parent office" outside Canada.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 60-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
14. Profits earned in Canada are more likely to be re-invested in Canada by Canadian-controlled firms than by foreign-controlled firms in the auto parts industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 61-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
15. Canadian-controlled companies in the auto parts industry generally show more regard for pollution control than do foreign-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 62-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
16. Tax incentives or other government actions, applied to both Canadian- and foreign-controlled companies, are necessary to maintain the prosperity of the auto parts industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 63-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |

SECTION C

ELECTRONICS

The following is a list of statements on various matters related to the electronics industry. We want to get your opinions for each of these statements...but if you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

- | | | | |
|--|--------------------------|-------------------------|--------------------------|
| 1. In the electronics industry Canadian-controlled companies tend to conduct more research and development in Canada than foreign-controlled companies do. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 48-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 2. Foreign-controlled companies are more efficient than Canadian-controlled companies in the electronics industry. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 49-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 3. Canadian-controlled companies in the electronics industry are more likely to order Canadian machinery, equipment and parts than are foreign-controlled firms. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 50-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 4. Foreign-controlled companies in the electronics industry have more success in exporting Canadian products than Canadian-controlled companies do. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 51-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 5. Canadian-controlled firms in the electronics industry are more capable of operating in line with government social and economic objectives than are the foreign-controlled companies. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 52-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 6. For major decisions, foreign-controlled companies in the electronics industry must follow the orders of their "parent office" outside Canada. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 53-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 7. The government should take action to improve the competitive position of Canadian-controlled firms in the electronics industry. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 54-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |
| 8. Whatever government action taken in the electronics industry should emphasize incentives to Canadian-controlled companies rather than restrictions on the operations of foreign-controlled companies. | | | |
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> |
| | | 55-1 | 4 |
| | | 2 | 5 |
| | | 3 | 6 |

10-5

SECTION C (Continued)

9. Foreign-controlled companies in the electronics industry generally show more regard for the local community than do Canadian-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 56-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
10. In case of declining business in the electronics industry, foreign-controlled companies will tend to wait longer than Canadian-owned companies before laying off workers.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 57-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
11. Canadian-controlled companies in the electronics industry do more manufacturing and processing in Canada, and thus tend to keep more jobs in Canada than foreign-controlled companies do.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 58-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
12. You cannot really tell Canadian- and foreign-controlled companies apart in the electronics industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 59-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
13. Foreign-controlled firms in the electronics industry are more competitive than Canadian ones are because they can import "know-how" and management talent from their "parent office" outside Canada.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 60-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
14. Profits earned in Canada are more likely to be re-invested in Canada by Canadian-controlled firms than by foreign-controlled firms in the electronics industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 61-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
15. Canadian-controlled companies in the electronics industry generally show more regard for pollution control than do foreign-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 62-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
16. Tax incentives or other government actions, applied to both Canadian- and foreign-controlled companies, are necessary to maintain the prosperity of the electronics industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 63-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |

SECTION C

PULP AND PAPER

The following is a list of statements on various matters related to the pulp and paper industry. We want to get your opinions for each of these statements....but if you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

- | | | |
|---|--|--------|
| 1. In the pulp and paper industry Canadian-controlled companies tend to conduct most research and development in Canada than foreign-controlled companies do. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 48-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 2. Foreign controlled companies are more efficient than Canadian-controlled companies in the pulp and paper industry. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 49-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 3. Canadian-controlled companies in the pulp and paper industry are more likely to order Canadian machinery, equipment and parts than are foreign-controlled firms. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 50-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 4. Foreign-controlled companies in the pulp and paper industry have more success in exporting Canadian products than Canadian-controlled companies. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 51-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 5. Canadian-controlled firms in the pulp and paper industry are more capable of operating in line with government social and economic objectives than are the foreign-controlled companies. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 52-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 6. For major decisions, foreign-controlled companies in the pulp and paper industry must follow the orders of their "parent office" outside Canada. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 53-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 7. The government should take action to improve the competitive position of Canadian-controlled firms in the pulp and paper industry. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 54-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 8. Whatever government action taken in the pulp and paper industry should emphasize incentives to Canadian-controlled companies rather than restrictions on the operations of foreign-controlled companies. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 55-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |
| 9. Foreign-controlled companies in the pulp and paper industry generally show more regard for the local community than do Canadian-controlled companies. | | |
| agree strongly | <input type="checkbox"/> disagree mildly | 56-1 4 |
| agree somewhat | <input type="checkbox"/> disagree somewhat | 2 5 |
| agree mildly | <input type="checkbox"/> disagree strongly | 3 6 |

10-6

SECTION C (Continued)

10. In case of declining business in the pulp and paper industry, foreign-owned companies will tend to wait longer than Canadian-owned companies before laying off workers.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	57-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

11. Canadian-controlled companies in the pulp and paper industry do more manufacturing and processing in Canada, and thus tend to keep more jobs in Canada than foreign-controlled companies do.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	58-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

12. You cannot really tell Canadian- and foreign-controlled companies apart in the pulp and paper industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	59-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

13. Foreign-controlled firms in the pulp and paper industry are more competitive than Canadian ones are because they can import "know-how" and management talent from their "parent office" outside Canada.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	60-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

14. Profits earned in Canada are more likely to be reinvested in Canada by Canadian-controlled firms than by foreign-controlled firms in the pulp and paper industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	61-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

15. Canadian-controlled companies in the pulp and paper industry generally show more regard for pollution control than do foreign-controlled companies.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	62-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

16. Tax incentives or other government actions, applied to both Canadian- and foreign-controlled companies, are necessary to maintain the prosperity of the pulp and paper industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	63-1	4
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	2	5
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	3	6

17. Foreign-controlled companies use Canada's natural resources with more regard for the future than do Canadian-controlled companies in the pulp and paper industry.

agree strongly	<input type="checkbox"/>	disagree mildly	<input type="checkbox"/>	64-Y	X
agree somewhat	<input type="checkbox"/>	disagree somewhat	<input type="checkbox"/>	0	1
agree mildly	<input type="checkbox"/>	disagree strongly	<input type="checkbox"/>	2	3

SECTION C

MINING

The following is a list of statements on various matters related to the mining industry. We want to get your opinions for each of these statements....but if you definitely can't answer a particular question, just write N.O. to indicate no opinion. (FOR EACH STATEMENT PLEASE CHECK ONE BOX ONLY)

- | | | | | |
|---|---|--|------|---|
| 1. In the mining industry Canadian-controlled companies tend to conduct more research and development in Canada than foreign-controlled companies do. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 48-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 2. Foreign-controlled companies are more efficient than Canadian-controlled companies in the mining industry. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 49-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 3. Canadian-controlled companies in the mining industry are more likely to order Canadian machinery, equipment and parts than are foreign-controlled firms. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 50-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 4. Foreign-controlled companies in the mining industry have more success in exporting Canadian products than Canadian-controlled companies do. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 51-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 5. Canadian-controlled firms in the mining industry are more capable of operating in line with government social and economic objectives than are the foreign-controlled companies. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 52-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 6. For major decisions, foreign-controlled companies in the mining industry must follow the orders of their "parent office" outside Canada. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 53-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 7. The government should take action to improve the competitive position of Canadian-controlled firms in the mining industry. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 54-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 8. Whatever government action taken in the mining industry should emphasize incentives to Canadian-controlled companies rather than restrictions on the operations of foreign-controlled companies. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 55-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 9. Foreign-controlled companies in the mining industry generally show more regard for the local community than do Canadian-controlled companies. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 56-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |
| 10. In case of declining business in the mining industry, foreign-controlled companies will tend to wait longer than Canadian-owned companies before laying off workers. | agree strongly <input type="checkbox"/> | disagree mildly <input type="checkbox"/> | 57-1 | 4 |
| | agree somewhat <input type="checkbox"/> | disagree somewhat <input type="checkbox"/> | 2 | 5 |
| | agree mildly <input type="checkbox"/> | disagree strongly <input type="checkbox"/> | 3 | 6 |

SECTION C (Continued)

10-4

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11. Canadian-controlled companies in the mining industry do more manufacturing and processing in Canada, and thus tend to keep more jobs in Canada than foreign-controlled companies do.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 58-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
12. You cannot really tell Canadian- and foreign-controlled companies apart in the mining industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 59-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
13. Foreign-controlled firms in the mining industry are more competitive than Canadian ones are because they can import "know-how" and management talent from their "parent office" outside Canada.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 60-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
14. Profits earned in Canada are more likely to be re-invested in Canada by Canadian-controlled firms than by foreign-controlled firms in the mining industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 61-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
15. Canadian-controlled companies in the mining industry generally show more regard for pollution control than do foreign-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 62-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
16. Tax incentives or other government actions, applied to both Canadian- and foreign-controlled companies, are necessary to maintain the prosperity of the mining industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 63-1 | 4 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 2 | 5 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 3 | 6 |
17. Foreign-controlled companies use Canada's natural resources with more regard for the future than do Canadian-controlled companies in the mining industry.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 64-Y | 1 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | X | 2 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 0 | 3 |
18. Foreign-controlled companies are carrying out more mineral resources exploration in Canada than Canadian-controlled companies.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|---|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 4 | 7 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | 5 | 8 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 6 | 9 |
19. Canadian-controlled companies tend to do more refining and processing in Canada than foreign-controlled companies do.
- | | | | | | |
|----------------------|--------------------------|-------------------------|--------------------------|------|---|
| agree strongly | <input type="checkbox"/> | disagree mildly | <input type="checkbox"/> | 65-Y | 1 |
| agree somewhat | <input type="checkbox"/> | disagree somewhat | <input type="checkbox"/> | X | 2 |
| agree mildly | <input type="checkbox"/> | disagree strongly | <input type="checkbox"/> | 0 | 3 |

4

5

6

BASIC DATA

(COMMON TO ALL INDUSTRIES)

Study S0581

SECTION D

In all surveys like this one some people completing the questions find that something which they feel is important has either been completely left out of the questionnaire or is not covered sufficiently.

We are truly interested in learning as much as possible about your opinions regarding these matters so if you can add anything more we would be pleased to have you record them on this page. If you need additional pages please number them and attach at the back.

SECTION E

(COMMON TO ALL INDUSTRIES)

These questions are intended to assess how you feel about Canada per se.

FOR
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- 1-a) First of all we'd like to ask you about your feelings about Canada. Please indicate whether you feel that your views on Canada are

very nationalistic? ☐
fairly nationalistic? ☐
just slightly nationalistic? ☐
not at all nationalistic? ☐

66-Y
X
0
1

- b) Do you think dependence on the U.S. is a good thing for Canada or not a good thing?

GOOD THING ☐
NOT A GOOD THING ☐
CAN'T SAY ☐

3
4
5

- c) Do you have any preference for working in a Canadian controlled rather than foreign controlled firm?

Yes ☐
No ☐

7
8

- d) Please think about your feelings of being a Canadian. Compared with how you felt four or five years ago, would you say that today your feelings of being a Canadian are MORE or LESS than they were four or five years ago?

MORE ☐
LESS ☐
ABOUT THE SAME ☐

67-Y
X
0

- e) Do you think there is enough U.S. capital in Canada now, or would you like to see more U.S. capital invested in Canada?

ENOUGH NOW ☐
LIKE TO SEE MORE ☐
UNDECIDED ☐

2
3
4

- f) It has been suggested that the government should set up an organization to screen the introduction of more U.S. capital into this country, with the object of checking to see whether or not the investments will serve the best interests of Canada. Some people think this is a good idea. Others disagree, and say it is not. What is your opinion?

GOOD IDEA ☐
NOT A GOOD IDEA ☐
UNDECIDED ☐

6
7
8

- g) Please look at the list of companies below and for each company indicate whether it is Canadian owned or Foreign owned. If you think it is Canadian owned check the box in the Canadian Owned column, and if you think it is foreign owned check the box in the Foreign Owned column.

CANADIAN OWNED	FOREIGN OWNED	DON'T KNOW
-------------------	------------------	---------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

(Names disguised for
presentation purposes)

68-Y X

1 2

4 5

7 8

69-Y X

1 2

4 5

7 8

70-Y X

1 2

4 5

7 8

71-Y X

1 2

SECTION D

(COMMON TO ALL INDUSTRIES)

CANADIAN FACTS CO. LIMITED
TORONTO - MONTREAL

7-2

FOR
OFFICE
USE
ONLY

BASIC DATA

The first six question areas are intended to provide descriptive information in order to assist in our analysis of the questions which will follow. Just as your identity will remain confidential, all of the following information will also,

1-a) Please indicate your age by checking the box opposite the correct age group.

less than 18	<input type="checkbox"/>	11-1
18 to 24	<input type="checkbox"/>	2
25 to 29	<input type="checkbox"/>	3
30 to 34	<input type="checkbox"/>	4
35 to 39	<input type="checkbox"/>	5
40 to 44	<input type="checkbox"/>	6
45 to 49	<input type="checkbox"/>	7
50 to 54	<input type="checkbox"/>	8
55 to 59	<input type="checkbox"/>	9
60 or over	<input type="checkbox"/>	0

-b) And in what country and province/state were you born?

_____ COUNTRY _____ PROVINCE/STATE

2-a) Please use the space below to indicate the total number of years you have been in this business, that is, employed in this industry.

-b) How many years have you been with the company you are currently with?

-c) Would you indicate whether this company is foreign owned or Canadian owned?

Wholly foreign owned	<input type="checkbox"/>	19-Y
Wholly Canadian owned	<input type="checkbox"/>	X
Partially Canadian, partially foreign, but foreign-controlled	<input type="checkbox"/>	0
Partially Canadian, partially foreign, but Canadian-controlled	<input type="checkbox"/>	1

-d) Have you ever been employed by a company in the same business outside Canada?

YES	<input type="checkbox"/>	3
NO	<input type="checkbox"/>	4

IF EVER EMPLOYED OUTSIDE CANADA, ANSWER d)

-e) In what country and city were you employed?

_____	COUNTRY	_____	CITY	20-
Any others?				21-
_____		_____		22-
_____	COUNTRY	_____	CITY	

Study S0581

- 2 -

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OFFICE
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3. Please indicate your educational background according to the list below.

- | | | |
|---|--------------------------|------|
| some or completed public school | <input type="checkbox"/> | 23-1 |
| some or completed high school | <input type="checkbox"/> | 2 |
| some technical/commercial school after high school | <input type="checkbox"/> | 3 |
| completed technical/commercial school after high school | <input type="checkbox"/> | 4 |
| some art college | <input type="checkbox"/> | 5 |
| completed art college | <input type="checkbox"/> | 6 |
| some university | <input type="checkbox"/> | 7 |
| completed university | <input type="checkbox"/> | 8 |
| some or completed post-graduate university | <input type="checkbox"/> | 9 |
| some special courses (e.g., CAAP) | <input type="checkbox"/> | 0 |

4-a) In what country(s) did you receive any training after high school?

- | | | |
|---------------------------|--------------------------|------|
| Canada only | <input type="checkbox"/> | 24-1 |
| Canada and outside | <input type="checkbox"/> | 2 |
| Outside Canada only | <input type="checkbox"/> | 3 |

IF ANY TRAINING OUTSIDE CANADA, ANSWER b)

-b) In what other country(s) did you receive this training?

5-a) Please state your position in this company.

-b) Please check a box to show your approximate annual income from this company.

- | | | |
|----------------------------|--------------------------|------|
| under \$8,000 | <input type="checkbox"/> | 31-Y |
| \$ 8,000 to \$10,999 | <input type="checkbox"/> | X |
| \$11,000 to \$13,999 | <input type="checkbox"/> | 0 |
| \$14,000 to \$16,999 | <input type="checkbox"/> | 1 |
| \$17,000 to \$20,999 | <input type="checkbox"/> | 2 |
| \$21,000 to \$25,000 | <input type="checkbox"/> | 3 |
| over \$25,000 | <input type="checkbox"/> | 4 |

6. Please indicate your sex, marital status and family composition.

- | | | | |
|----------------------------|--------------------------|--------------------------|------|
| SEX | MALE | <input type="checkbox"/> | 32-1 |
| | FEMALE | <input type="checkbox"/> | 2 |
| MARITAL STATUS | MARRIED | <input type="checkbox"/> | 33-1 |
| | SINGLE | <input type="checkbox"/> | 2 |
| HAVE CHILDREN | <input type="checkbox"/> | 34-1 | |
| DO NOT HAVE CHILDREN | <input type="checkbox"/> | 2 | |

7. Are you affiliated with a union?

- | | | |
|----------|--------------------------|------|
| NO..... | <input type="checkbox"/> | 35-1 |
| YES..... | <input type="checkbox"/> | 2 |

Please specify which union.

36-
37-

APPENDIX B

METHOD FOR CALCULATING STATISTICAL
SIGNIFICANCE OF RESPONSES TO SCALE QUESTIONS

METHOD FOR CALCULATING STATISTICAL
SIGNIFICANCE OF RESPONSES TO SCALE QUESTIONS

The following method was used to decide if the answers in the report given by employees of Canadian-controlled and of foreign-controlled firms were significantly different:

1. For each question the following weight factors were given for each possible answer:

<u>Weight Factor</u>	<u>Answer</u>
+3	Agree strongly
+2	Agree somewhat
+1	Agree mildly
-1	Disagree mildly
-2	Disagree somewhat
-3	Disagree strongly

2. Let P_i be the percentage of employees of Canadian-controlled firms giving an answer with weight factor i .

Then the score, S_c , of employees of Canadian-controlled firms for a particular question equals $\sum_{i=-3}^{i=+3} ip_i$, the

weighted sum of the percentages.

S_F is defined similarly for employees of foreign-controlled firms.

3. Let c_i be the confidence interval for a 95% level of accuracy; that is the interval or range of values around the stated response from those sampled within which the response of the entire population would fall 95 times out of 100. This

confidence interval depends on the sample size, as shown in Exhibit 1, page 12. Then an overall confidence interval

K_C (for employees of Canadian-controlled firms) was taken as $\sum_{i=-3}^{i=+3} i c_i$, the weighted sum of the confidence intervals.

K_F was similarly defined for foreign-controlled employees.

4. K was taken as the sum of K_C and K_F .
5. If the two scores S_C and S_F differed by more than K then it was said that the difference in answers given by the two groups was statistically significant.

Example:

Suppose 85 responded from Canadian-controlled companies and 101 responded from foreign-controlled companies, with the following breakdown of opinions:

Weight Factor	Percentage Responding To Answer For Canadian Controlled Companies	Percentage Responding To Answer For Foreign Controlled Companies	95% Confidence Canadian Controlled Companies	Level Foreign Controlled Companies
+3	55%	5%	15.	3.
+2	25%	10%	13.	7.
+1	10%	60%	8.	10.
-1	5%	15%	3.	8.
-2	3%	5%	2.	3.
-3	2%	5%	2.	3.
Total Score	$S_C = 208$	$S_F = 55$	Total Accuracy Limit $K_C = 92$	$K_F = 56$

Therefore, $K = 92 + 56 = 148$

Now $208 - 55 = 153$ is greater than 148. Therefore the difference in answers in this case was statistically significant.

3 1761 11465971 7

